

User Manual



User Manual InLoox 10

InLoox for Windows
InLoox for Outlook

Author

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Date

04/02/2024

Content

Budget Overview	9
Selected Budget Overview features	9
Table View	11
Chart View	11
Budgets	13
Budget types	13
Automatically created budget types	13
Budget types you can create manually	14
Create and edit a budget	14
Create a new budget	14
Manage the budget status	16
Generate an invoice	16
Create a budget report	17
Save and load budget templates	18
Create and edit a budget item	19
Create a new budget item	19
Manage the status of a budget item	22
Link documents to budgets/budget items	22
Calendar	24
Introduction	24
Views	24
Create your personal calendar view	25
Conditional Formatting	26
Save a calendar view	27
Edit planning elements	28
Create a new project	29
How to create a new project	29
How to submit a project request	34
Search and filter project information	36
Customization	37
Backup project data	37
Change the time zone	38
Create and edit custom fields	38
Customizing the InLoox PM language files	44
Generate personalized views	44

Notifications.....	46
Work offline with InLoox for Outlook.....	54
Dashboard view	58
Adjust the dashboard view	58
Dashboard standard views	59
Create a new dashboard	61
Designing dashboards	62
Getting started	62
Creating a data source	63
Providing data	66
Using dashboard parameters.....	68
Creating dashboard items.....	70
Binding dashboard items to data	85
Data shaping	89
Interactivity.....	96
Dashboard layout	97
Documents	100
Organize personal and project-independent documents.....	100
Organize project-related documents	101
Add and edit project documents	101
The document list in a project	104
Clean up the document list in InLoox PM.....	108
Create the document folder path in InLoox PM	108
Getting started.....	110
Global task view.....	112
Content of the global task view	113
Create, edit and delete tasks	113
Create and edit tasks.....	113
Assign a task to a project.....	114
Notifications and notes	116
Mark tasks as done.....	117
Delete a task	119
Filter options.....	119
Customize the list view.....	120
Save and re-use views	122
Track time efforts	123

Refreshing tasks	123
Task list in the side panel.....	124
Here you can find InLoox in Outlook.....	125
History	126
View and features in the history	126
How to organize the view and use filters	127
InLoox options	129
Adjust the customer number.....	129
Adjust a customer number	129
Mode description for prefix and suffix	130
Examples of common formats	131
Adjust the division structure	132
Create a new division	132
Edit and Delete already existing divisions	133
Effects of creating, editing and deleting a division.....	134
Adjust the project number	134
Edit the project number	134
Mode description for prefix and suffix	135
Examples of common formats	135
Budgets.....	136
Manage budget and budget item templates	136
Manage the budget statuses	139
Change the language of InLoox.....	140
Change the number format	140
Format rules.....	140
Sample formats.....	141
Create an InLoox PM user account	141
InLoox PM authentication.....	141
Change the InLoox PM password	143
Create and Assign Skills	143
Create a new skill	145
Assign a skill to a resource	145
Create and edit groups.....	146
Create and manage customers	149
Documents	150
Change the document folder path	150

Edit the document folder structure	152
Set rules for document folder structure.....	153
Edit the project statuses.....	155
Lock and unlock project access.....	157
Manage e-mail templates.....	157
Manage mind map templates.....	159
Manage notification templates (InLoox PM)	159
Customize/Design notification templates	159
Default notification templates	162
Define notification type	163
Introduction to notification templates.....	164
Manage project categories	165
Manage report templates	167
Open the InLoox options	170
Set user permissions	170
Overview of role and account-based security architecture.....	170
Set user-based permissions	173
Set role-based permissions.....	173
Task settings.....	174
Customize the Kanban board.....	174
Manage task templates	175
Set the update interval.....	176
User permission options.....	177
Interaction between InLoox and Outlook	181
How to use e-mails in InLoox.....	182
Synchronization between InLoox and Outlook.....	188
InLoox email templates	188
Work with E-mail templates	189
Manage E-mail templates.....	189
Lists	191
Create and edit a to-do list	191
Create a list template.....	193
Mind Maps	194
Create a mind map.....	194
How to create a plan-based mind map	194
How to create a task-based mind map.....	197

Selected Mind Map features	199
Create tasks from a mind map.....	200
Copy a mind map to the planning.....	201
Export a mind map template.....	202
Import a mind map template	203
People/ Contact management.....	204
Create, edit and delete InLoox contacts.....	204
Manage InLoox address books.....	206
Address book view	207
Create, edit and delete address books.....	208
Features in the address book view.....	209
Manage InLoox users	210
Add extern users to InLoox	210
Additional log on option to InLoox Web App for Office 365 users.....	212
Invite new users to InLoox now!	215
Project list.....	216
Selected project list features	216
Conditional formatting as a warning system	218
Add Simple Formatting	219
Add Extended Formatting.....	219
The tree structure in the project list	220
Timeline	221
Recycle Bin.....	222
How to duplicate a project	223
Print the project list	224
Search and filter projects	224
Search function	224
Quick filters.....	225
How to filter the project list [advanced]	226
Project planning.....	226
Create, edit, and delete new planning elements – activities and milestones.....	227
Create new activities and milestones.....	227
Create summary activities	229
Delete planning elements.....	231
Change the order of the planning elements.....	231
Convert planning elements: activity <-> milestone.....	231

Link planning elements automatically.....	232
Highlight planning elements.....	233
Dependencies between planning elements.....	233
Create dependencies manually.....	233
Edit dependencies.....	234
Overview: Types of dependencies.....	234
Set the start date and duration of planning elements.....	235
Delete dependencies.....	238
Set constraints.....	239
Set constraints on activities and summary activities.....	239
Set constraints on milestones.....	240
Overview: Types of constraints.....	241
Remove constraint.....	245
Add lag to planning elements.....	245
Add tasks to your project plan.....	246
Project groups: Multi-project management with dependencies between projects.....	247
Create a project group.....	248
Change the order of the sub-projects in project groups.....	250
Highlight sub-projects in different colors.....	251
Display project groups in the project list and sort the list accordingly.....	251
Remove sub-projects from the project group.....	254
Delete a project group.....	256
Publish planning elements in other project plans.....	257
Publish planning elements.....	257
Necessary permissions.....	259
Notifications.....	259
How to use published elements in the target project.....	260
Behavior in case of constraint violation.....	261
Add columns to the planning list.....	261
Displaying fields as columns.....	261
Overview of fields.....	264
Critical path, slack, and time line.....	267
Show critical path in Gantt chart.....	267
Snapshot Feature.....	268
Use planning elements in other projects.....	268
Publish planning elements.....	269

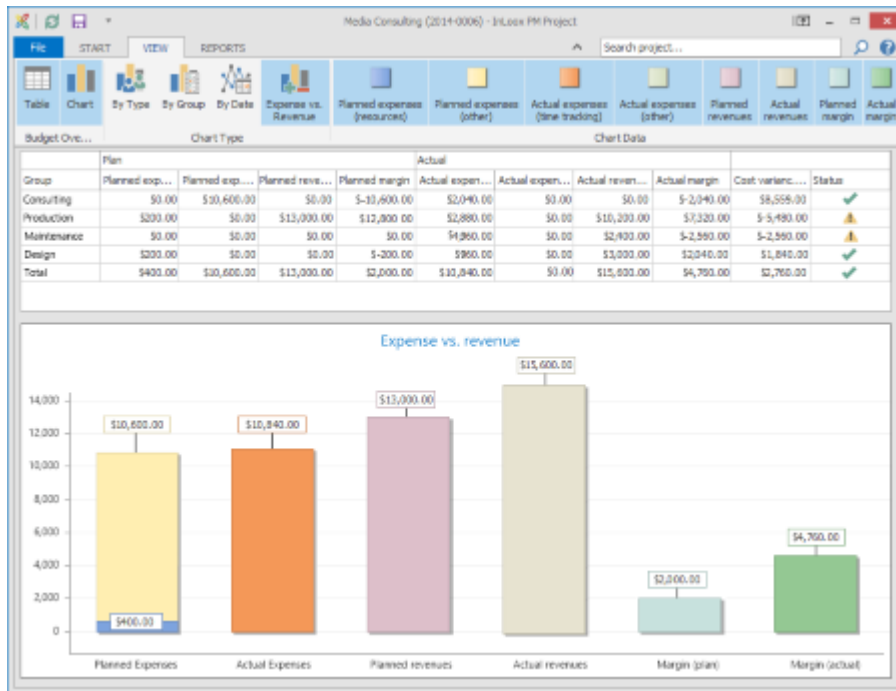
Necessary permissions	270
Notifications.....	270
How to use published elements in the target project.....	271
Behavior in case of constraint violation	272
Fixed Deadline	273
Print planning	273
1. How to open the print preview	273
2. Overview of the print preview ribbon	274
3. Print preview features in detail.....	275
Project-related tasks	278
Create, edit and delete project tasks	278
Create tasks manually	278
Edit tasks.....	282
Delete tasks.....	283
Team task management with Kanban	284
How a Kanban board works	284
Edit or delete a status.....	284
Meaning of the icons on a Kanban card	285
Customize the task view	286
Sort tasks	286
Color	287
Show details.....	287
Filter	288
Assign tasks to resources.....	289
Task templates	291
Save and load task templates	291
Export and import task templates.....	292
Add tasks to the project schedule.....	293
Reports	295
Create standard reports	296
Create global project reports	296
Create project-related reports	297
Standard InLoox reports	298
How to filter report data	303
How to save filter settings permanently.....	307
InLoox report designer	309

How to manage report templates.....	310
InLoox Report Designer	314
Resources and Allocation	322
Open the resources and workload allocation overview.....	322
Selected allocation features	327
Show the workload in the resource overview	330
Work with the resource overview.....	332
Add a new team.....	334
Add a new resource	335
Re-Assign a task	336
Change the date range	337
The workload chart	339
Time tracking.....	339
Create and edit time tracking entries.....	340
Create and edit time tracking entries within a project.....	340
Create and edit time tracking entries in the time tracking overview.....	341
Create a reminder	342
How to create a reminder in the time tracking overview.....	342
How to create a reminder in the time tracking view within a project	343
Record working time with the InLoox stopwatch	343
Customize time tracking views	344
Analytical filter.....	344
Select fields.....	344
Group feature	345
Sort time tracking entries	345
Save customized views.....	345

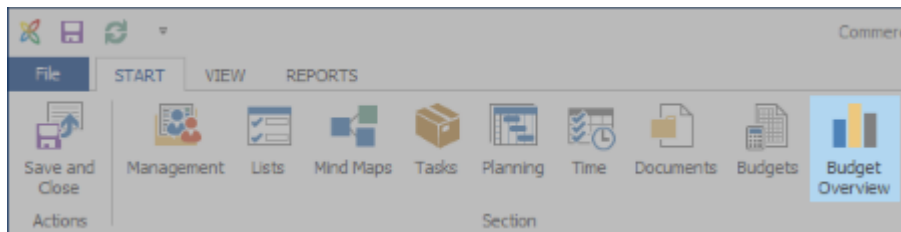
Budget Overview

Selected Budget Overview features

It is vital to control a project's budget tightly. The Budget Overview in InLoox for Outlook enables you to compare your project's actual and planned expenses in real-time.



To get to the Budget Overview, navigate to an **InLoox Project** >> **Start** >> **Budget Overview**.



The budget view is a visualization of your budget, so all the data in the budget overview come directly from your project budget. To be able to see anything in the budget overview, you will need to have the respective budget data. You can control which data you want to see in the budget overview, but you can only make edits to them in the budgets directly.

You can decide what information you want to see in the budget overview of your project. Display your budget as a table, sorted by budget group, or view it in various chart types, depending on the information you would like to display.

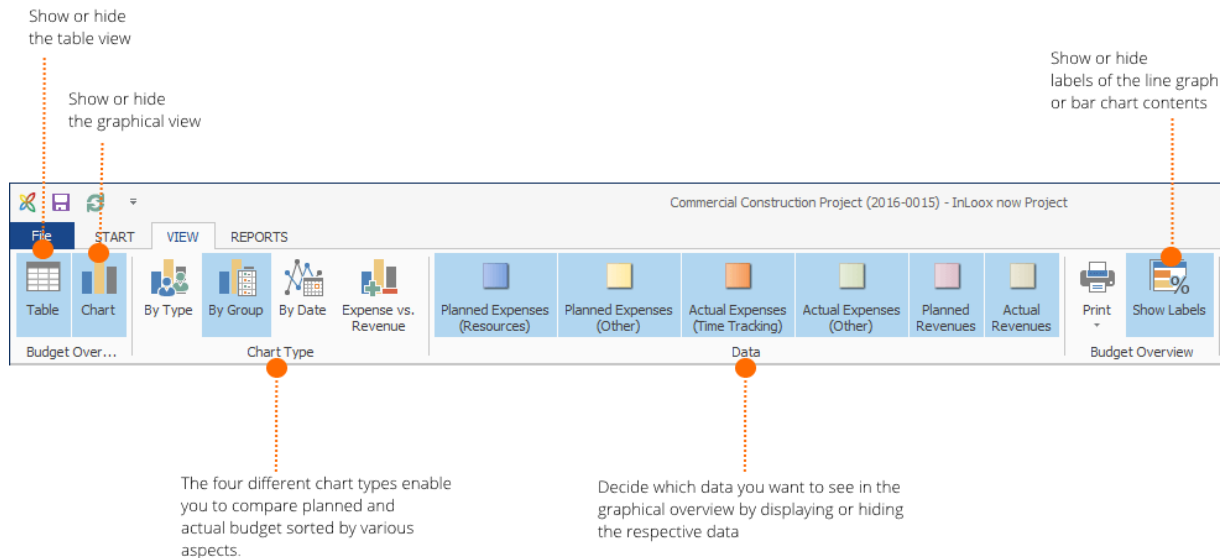


Table View

Table	Chart	By Type	By Group	By Date	Expense vs. Revenue	Planned expenses (resources)	Planned expenses (other)	Actual expenses (time tracking)	Actual expenses (other)	Planned revenues	Actual revenues	Planned margin	Actual margin
Budget Over...	Chart Type				Chart Data								
	Plan				Actual								
Group	Planned exp...	Planned exp...	Planned reve...	Planned margin	Actual expen...	Actual expen...	Actual reven...	Actual margin	Cost varian...	Status			
Consulting	\$0.00	\$10,600.00	\$0.00	\$-10,600.00	\$2,040.00	\$0.00	\$0.00	\$-2,040.00	\$8,559.00	✓			
Production	\$200.00	\$0.00	\$13,000.00	\$12,800.00	\$2,880.00	\$0.00	\$10,200.00	\$7,320.00	\$-5,480.00	⚠			
Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$4,960.00	\$0.00	\$2,400.00	\$-2,560.00	\$-2,560.00	⚠			
Design	\$200.00	\$0.00	\$0.00	\$-200.00	\$960.00	\$0.00	\$3,000.00	\$2,040.00	\$1,840.00	✓			
Total	\$400.00	\$10,600.00	\$13,000.00	\$2,000.00	\$10,840.00	\$0.00	\$15,600.00	\$4,760.00	\$2,760.00	✓			

The table view gives you an overview of all your budget data sorted by group. The table shows the planned expenses and revenues, the actual expenses and revenues, and a comparison between actual and planned budget.

Another way to identify budget overruns is to check the status column. It shows you whether your project is within budget or not:

✓ = Project is on budget, i.e. the actual expenses are within the planned budget.

⚠ = Actual expenses are higher than planned expenses and you need to control your budget.

Chart View

The chart view gives you a visual overview of your planned and actual budget. This enables you to quickly see whether your project is still within budget.

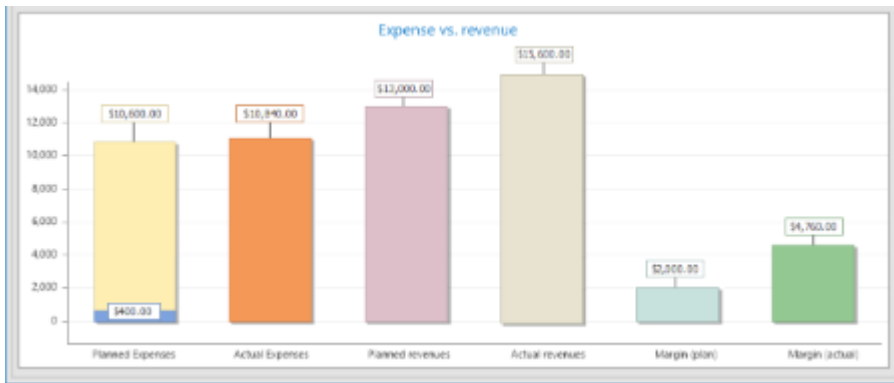
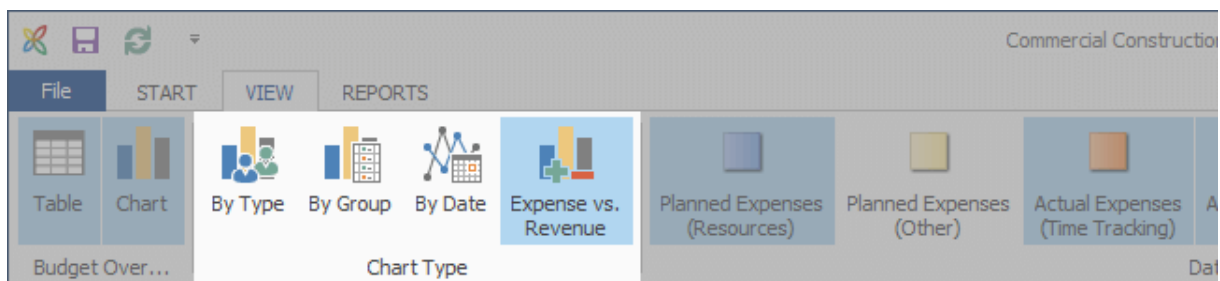


Chart type

You can choose between four chart types, which display and sort the budget according to different criteria:



By Type – Graphical overview of all expenses and revenues

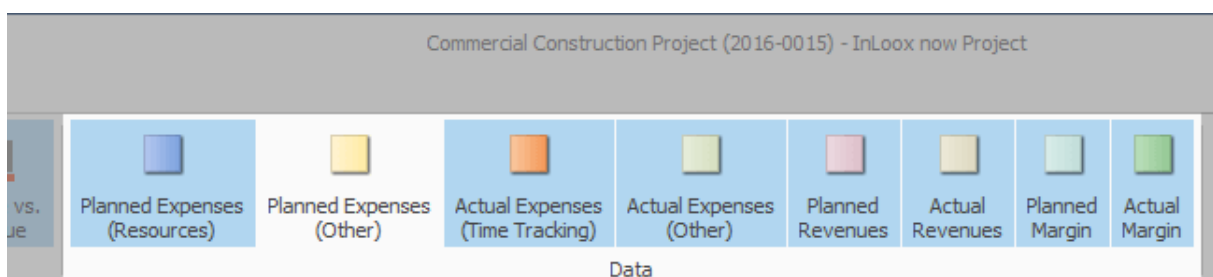
By Group – Graphical overview of all expenses and revenues sorted by group

By Date – Graphical overview of all expenses and revenues sorted by date (day, month, year)

Expense vs. Revenue – Comparison between actual and planned expenses, and actual and planned revenues

Data

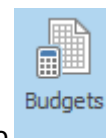
You can also choose which data should be shown in or hidden from the graphical overview.



Planned Expenses (Resources)	Based on the recorded resources working on the project tasks. The total work time of all resources multiplied by the purchase price of the respective group.
Planned Expenses (Other)	All other planned expenses based on the purchase price, excluding resources.
Actual Expenses (Time Tracking)	Based on the time tracking entries in the InLoox tasks.
Actual Expenses (Other)	All other actual expenses for already received services or commissioned orders. The total sum is based on the purchase price of the group.
Planned Revenues	All planned revenues based on the sales price of the respective group.
Actual Revenues	All revenues from already invoiced services or for services the customer has already received. The total sum is based on the sales price of the respective group.
Planned Margin	Comparison between planned revenues and planned expenses.
Actual Margin	Comparison between actual revenues and actual expenses.

Budgets

InLoox for Outlook enables you to create and manage your project budgets, so you always have an overview of your project's financial status.



To get to your project budgets open an InLoox **Project** and navigate to  on the **Home** tab.

Budget types

Automatically created budget types

InLoox generates two budgets automatically:

- **Expense (actual, time tracking)**

- **Expense (plan, resources)**

Expense (actual, time tracking) is based on the time tracking entries in the InLoox tasks, the Expense (plan, resources) is based on the resources working on the project tasks.

EXPENSE/REVENUE ▲		PLAN/ACTUAL ▲	
DATE	NAME	BUDGE...	CREAT... ... T
▲ Expense (\$141,161.33)			
▲ Actual (\$52,221.33)			
6/16...	Expense (actual, time tracking)	<input type="checkbox"/>	6/16/2016 ...
▲ Plan (\$88,940.00)			
6/16...	Expense (plan, resources)	<input type="checkbox"/>	6/16/2016 ...

Both budgets are only automatically filled with budget items if they fulfill these requirements:

1. You have created tasks in a project
2. You have assigned time tracking entries to project-specific tasks, or have assigned resources to these tasks
3. You have specified the effort for the tasks

You can't edit some elements of the budget items, such as group, units etc. If you want to make changes then you'll have to make the edits in the tasks or time tracking entries directly.

Budget types you can create manually

Next to the two automatically created budget, you can also create four types of budgets manually:

Planned Expense – Use this budget type to create a budget for your planned expenses based on the purchase price.

Actual Expense – Use this budget type to create a budget for commissioned orders or already received services. The sum of the budget items will be calculated based on the purchase price of the group.

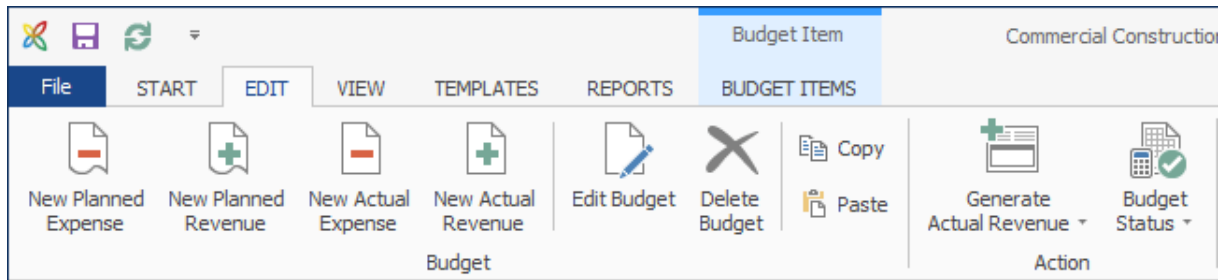
Planned Revenue – This budget type is used to create a budget for planned revenues based on the sales price of the respective group.

Actual Revenue – Use this budget to create a budget for already invoiced services or for services the customer has already received. The sum of the budget is based on the sales price of the respective group.

Create and edit a budget

Create a new budget

1. Open an existing **Project** or create a new one.
2. Click on **Budgets** in the **Start** tab.
3. Depending on what type of budget you want to create, choose one of the four budgets in the Edit tab: **New Planned Expense**, **New Planned Revenue**, **New Actual Expense** or **New Actual Expense**.



4. The new budget document will immediately appear in the budget list under Expense or Revenue respectively.

DATE	NAME	BUDGE...	CREAT...	...	T
EXPENSE/REVENUE PLAN/ACTUAL					
▲ Expense (\$141,161.33)					
▲ Actual (\$52,221.33)					
6/16...	Expense (actual, time tracking)	<input type="checkbox"/>	6/16/2016	...	
▲ Plan (\$88,940.00)					
9/30...	Expense (plan) 1	<input type="checkbox"/>	9/30/2016	...	
6/16...	Expense (plan, resources)	<input type="checkbox"/>	6/16/2016	...	

5. Edit the budget from the side panel

General ✕

Name:

Status: ▼

Date: ▼

Created By ▲

... ▼

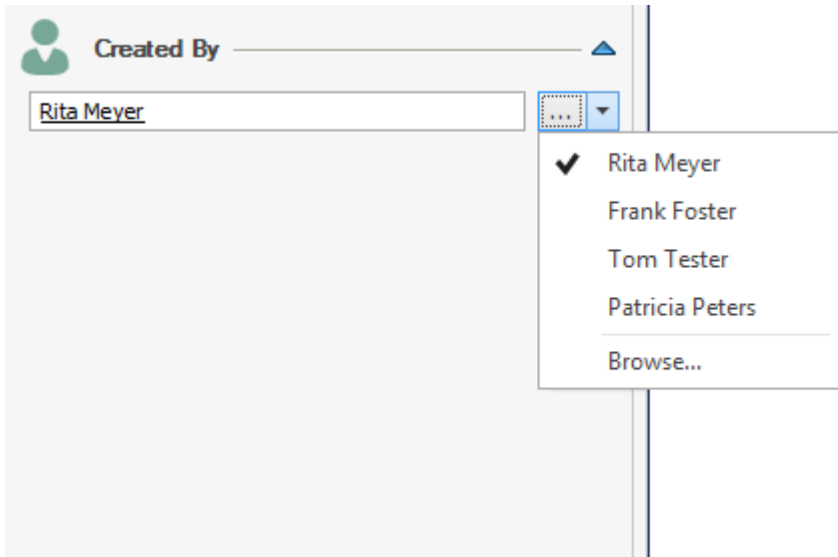
- **General**

- *Name*: Give your budgets clear names that allow you and your customers to easily assign them to a project. InLoox automatically assigns the names Expense (Actual), Expense (Plan), Revenue (Actual) or Revenue (Plan) combined with the consecutive number, depending on the budget type you have chosen.
- *Budget Status*: Choose in the dropdown list between Approved, Rejected or Open.

TIP

Use the status Open for not yet received quotations or outstanding invoices etc.

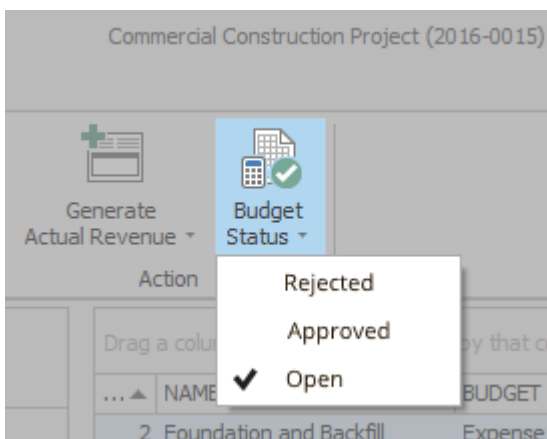
- *Date*: Specify a date for the budget. InLoox assigns the current date by default.
- **Created by**
 - Click on [...] to choose a resource from your global address book. Alternatively, click on the arrow to choose from a list of recently used resources.



Manage the budget status

Every budget can either have the status **Open, Rejected, or Approved**.

TIP You can define your own budget status in the InLoox Options.



Open and **Approved** budgets are defined as budget relevant by default. Budgets with the status **Rejected** are defined as budget neutral. This means, that only open and approved budgets will be used for the calculations of project budgets and will be shown in budget reports or the budget overview.

Generate an invoice

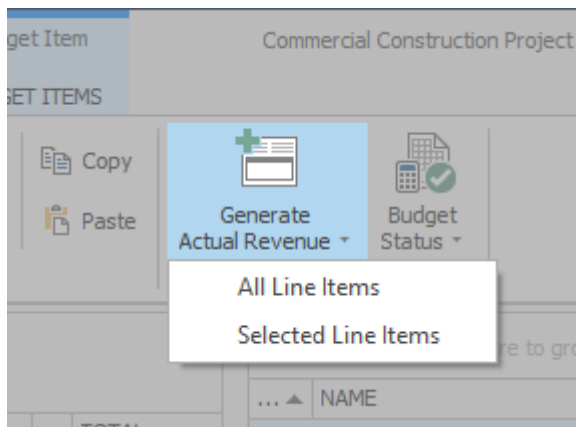
You can create, send and follow up on project-based offers and invoices with InLoox. The chosen budget items will automatically be marked as billed to avoid confusion and double billing.

Follow these steps to create an invoice:

1. Go to **Projects >> Budgets >> Edit**

2. Mark an **Actual Expense** in the budget list, for which you want to create an invoice (Actual Revenue). If you only want to bill certain budget items, then only choose the relevant budget items. To do so keep the CTRL button pressed while left-clicking on the items you want to include in your invoice.

3. Click on **Generate Actual Revenue** to create an invoice based on your chosen budget.



If you want to bill the whole budget, then choose **All Line Items** in the drop down menu. If you only want to bill the items marked in step 2, then choose **Selected Line Items**.

4. You find the created bill in the budget list under Actual Revenue and you can edit it in the side panel.

TIP Only use the button **Generate Actual Revenue** for billable budgets, e.g. performed consulting tasks for which you are charging a customer. For deposits for which you did not provide any services, e.g. rent payments, use **New Actual Revenue**.

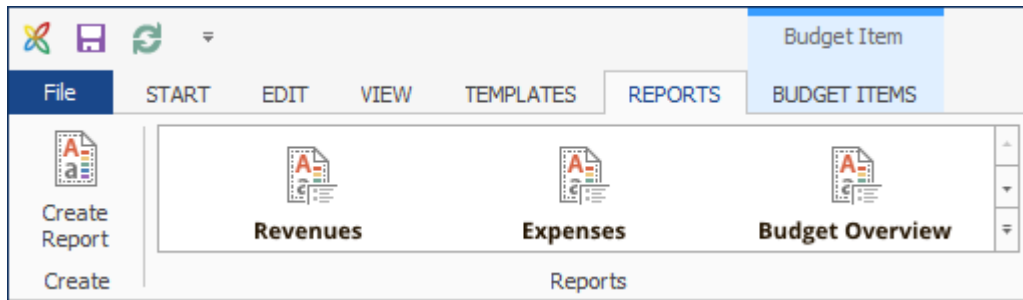
Create a budget report

If you want to create a budget report, e.g. to present your customer with an invoice, follow these steps:

1. Go to **Project >> Budgets >> Reports**

2. Mark the budgets for which you want to create a report.

3. The ribbon shows you all available budget report templates. The templates **Revenues/Expenses**, **Budget Overview** and **Revenues** are already included in the InLoox Options. Go to InLoox Options >> Reports to edit or create new templates



4. After the budget report is created, you can preview the document and you can export the report as an Excel or PDF file, or send it via email.

TIP Find more detailed information on reports under Project reporting features.

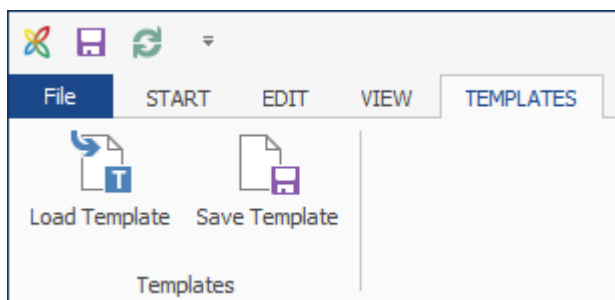
Save and load budget templates

You can reuse a budget for recurring projects by saving it as a template instead of creating a new one every time.

Save a budget template

Follow these steps to save a budget as a template:

1. Navigate to **Projects >> Start >> Budgets >> Templates**
2. Mark the budget you would like to save as a template. If you do not want to save all budget items, then only mark the ones in the budget items list which you want to include in the template. To choose multiple items, hold the CTRL button and left-click on all relevant items.
3. Click on **Save Template** in the ribbon.



4. You can edit the following information in the pop-up window:

- **Name:** Assign the template a clear name so you can easily find and easily match it later.
- **Type:** The template will be assigned the same budget type as the original by default.
- **Line Items:** You can either save the whole budget including All line items, or only the Selected items you have marked in step two.
- Budget templates are not automatically visible to all users. If you would like to make it **Visible for all users** mark the box accordingly.

Load a budget template

To load a previously created budget, follow these steps:

1. Choose an existing budget
2. Click on **Load template** in the tab **Templates**
3. A dialogue window will open where you can choose a template from a dropdown menu. You can also get a preview of the budget items saved in the template.
4. Confirm your selection with **OK**.

Create and edit a budget item

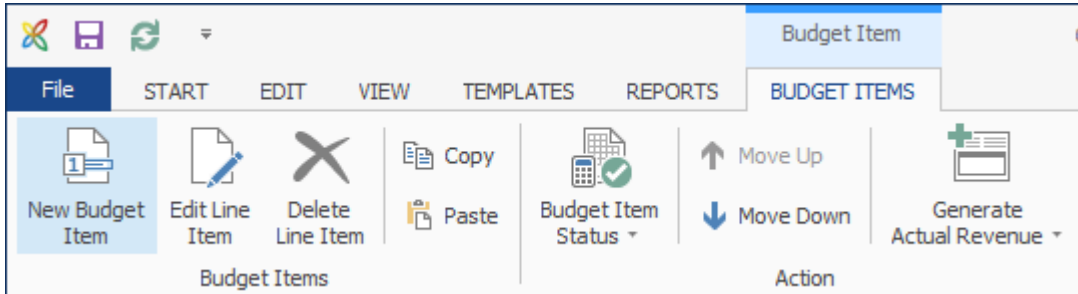
Create a new budget item

DATE	NAME	BUDGE...	CREAT...	TOTAL
Expense (\$141,161.33)				
Actual (\$52,221.33)				
6/15...	Expense (actual, time tracking)		6/15/2016	\$52,221.33
Plan (\$88,940.00)				
6/15...	Expense (plan, resources)		6/15/2016	\$81,200.00
9/30...	Expense (plan) 1		9/30/2016	\$7,740.00

NAME	BUDGET	UNIT	GR...	BILLED
1 Carpeting and Base	Expense (pla...	Stunde	1.5 Prod...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>
2 Exterior Wall Surfaces	Expense (pla...	Hours	8 Ent...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>
3 Rough-in Ductwork, Plumbing...	Expense (pla...	Hours	8 Ent...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>
4 Drywall	Expense (pla...	Hours	8 Ent...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>
5 Painting	Expense (pla...	Hours	8 Ent...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>
6 Finishes	Expense (pla...	Hours	8 Ent...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>
7 Plumbing, Heating, and Electr...	Expense (pla...	Hours	8 Ent...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>
8 Flooring	Expense (pla...	Hours	8 Ent...	\$...	\$...	\$...	\$...	<input checked="" type="checkbox"/>

Every budget can have as many budget items as needed. Follow these steps to create a new budget position:

1. Navigate to **Projects >> Start >> Budgets** and open an existing budget or create a new budget.
2. Go to the tab **Budget Items** and click on **New Budget Item**.



3. Edit the newly created budget item in the side panel

Line Item ✕

Select a group, then an template

<p>Group</p> <ul style="list-style-type: none"> Design <li style="background-color: #e0e0e0;">Production Consulting Maintenance 	<p>Template</p> <ul style="list-style-type: none"> (no template) <li style="background-color: #e0e0e0;">Products Template
---	--

General ▲

Name

Description

Pricing ▲

Quantity Unit(s)

Purchase price	<input style="width: 40px;" type="text" value="\$40.00"/>	Total	<input style="width: 40px;" type="text" value="\$60.00"/>	i
Sales price	<input style="width: 40px;" type="text" value="\$60.00"/>	Total	<input style="width: 40px;" type="text" value="\$90.00"/>	

Details ▲

Performed by ... ▼

Provision date ▼

Budget
Budget Item

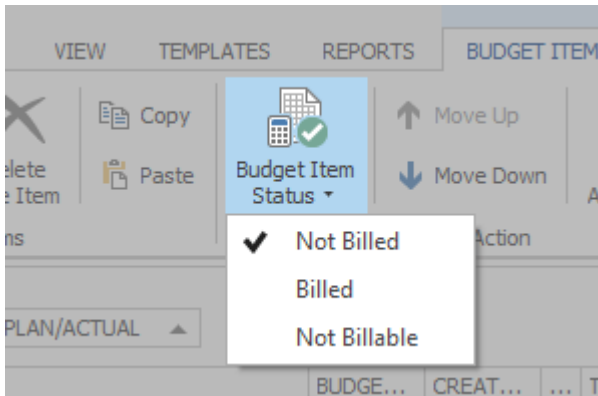
- **Line Item:**
 - *Group* - Each group has their own purchase and sales price, which are necessary for generating the budget sum. The following groups are saved in the InLoox options by default: Draft, Production, Consulting, and Maintenance. **TIP** You can edit or create new groups in the InLoox options.
 - *Template* – Choose a template for the chosen group. A template is relevant for the pricing as it determines which quantities and units will be used to determine the budget.
- **General:**
 - *Name and Description* – Assign your budget item a clear name and, if necessary, add a description to further clarify the item.
- **Pricing:**
 - *Quantity* – Define how many units an item should include. For example, if you would like to bill 90 minutes of consulting as an hourly value, enter the number 1,5.
 - *Unit(s)* – Units are defined in the options, which is why the unit depends on which group you have chosen in General. A unit can be for example: *Minutes, Hours* or *Days*.
 - *Sales and Purchase Price* – The prices are automatically taken from the values you have defined in the InLoox Options. You can also manually define the sales and purchase prices. These changes won't have an impact on the settings in the Options. **TIP** Taxes are included in the prices, as InLoox only calculates with net prices.
 - *Total* – The quantity will either be multiplied with the sales or purchase prices, depending on the budget type. You can identify the price that was used for the calculation by the yellow highlight. With a mouse over on the information icon, you will also get an explanation as to why the budget was used for the calculation.
- **Details:**
 - *Performed by* – The person who created the budget item will always be assigned to it by default. You can assign another person to the budget by clicking on [...] and choose someone from your address book.
 - *Provision date* – The current date is automatically stated. You can manually change the date to the appropriate time.

TIP It is also possible to copy a budget item from another budget or project: Use the commands **CTRL+C** (copy) and **CTRL+V** (paste), or alternatively use the copy and paste buttons in the ribbon in the tab Budget Items.

TIP You can't add any new budget items for the automatically created budgets Expense (actual, time tracking) and Expense (plan, resources). All items are automatically taken from the time tracking or the resources' tasks and editing is restricted. If you want to edit an item from one of these two budgets, you will have to do so in the respective **time tracking** entry or the respective **task**.

Manage the status of a budget item

Every budget item can have one of three statuses: **Not Billed**, **Billed**, and **Not Billable**.



To change a budget item's status, do as follows:

1. Go to **Project >> Budgets >> Budget Items**
2. Choose the budget item, whose status you want to change
3. In the ribbon click on **Budget Item Status** and choose the appropriate status: *Not Billed*, *Billed*, *Not Billable*

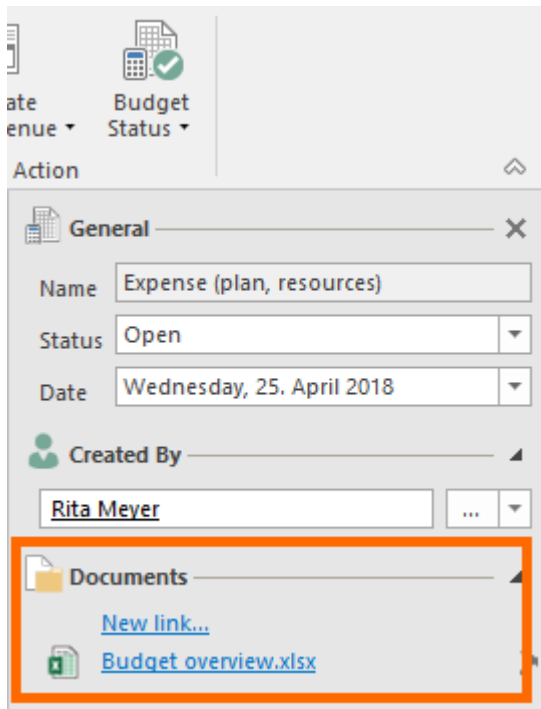
Every newly created budget item is marked as *Billable* and *Not Billed* by default, which means that the customer will be billed for the service. Would you like an item to be documented, but do not want it to appear on the invoice, then mark the item as *Not Billable*.

Already Billed items will automatically be marked by the system to avoid double billing. This also enables you to keep an overview over all items which have not yet been billed.

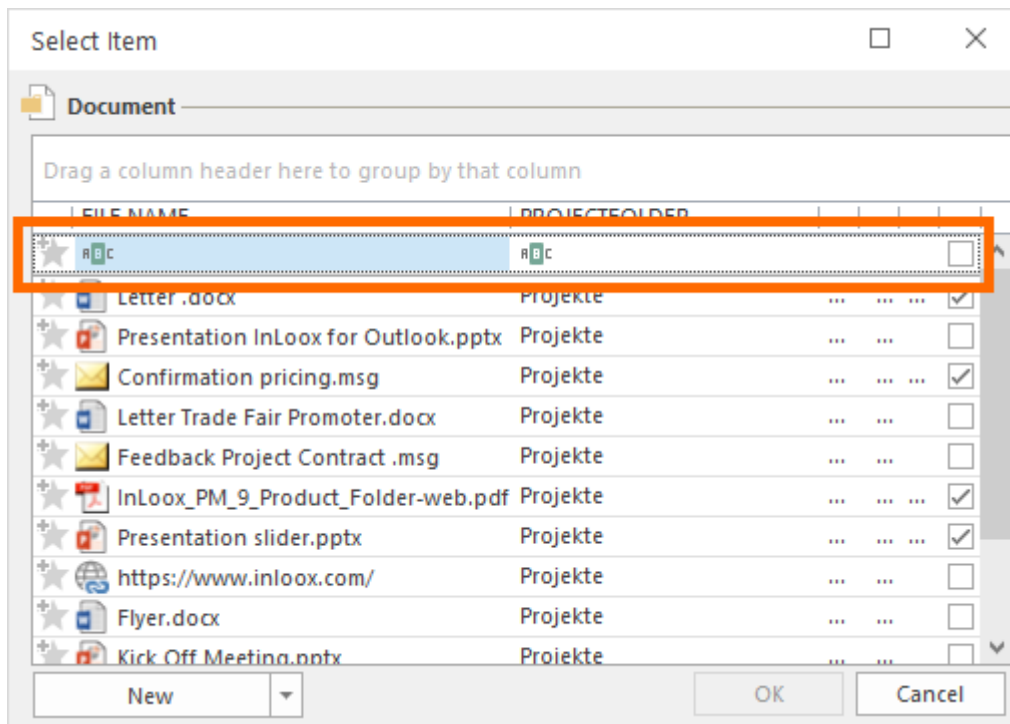
[Link documents to budgets/budget items](#)

It is possible to attach an Excel table, a contract or any type of documents to project budgets or individual budget items. This enables you to establish better comprehensibility, e.g. for invoices.

1. To attach a document, double-click on a **budget** or **budget item**.
2. In the side panel, click on **New link** under Documents.



3. In the dialog box, select the document from the list of existing project documents. You can also search for a specific document (e.g. by file name) by typing your query in the bar above the respective column header.

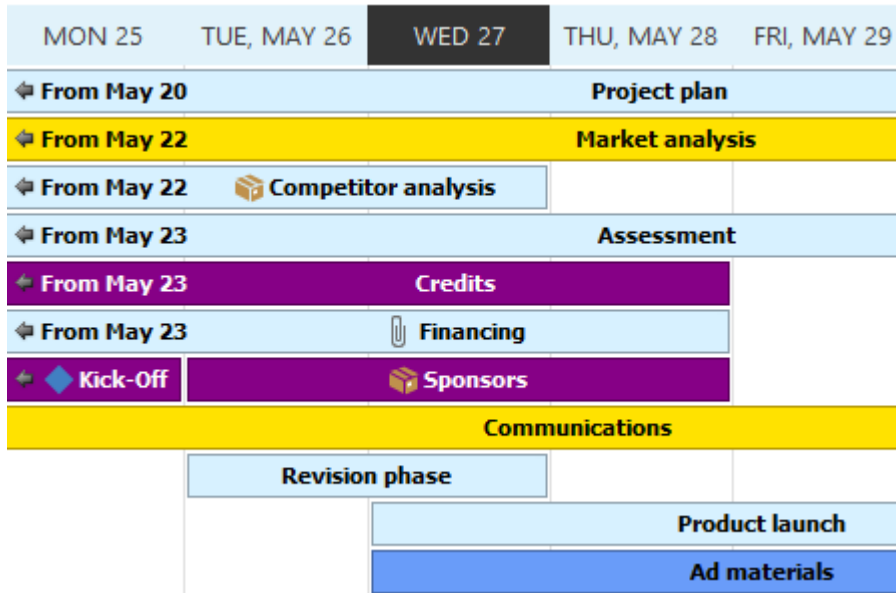


4. You can also click **New** to upload a new file (New file), link to a new file or add a new internet URL.

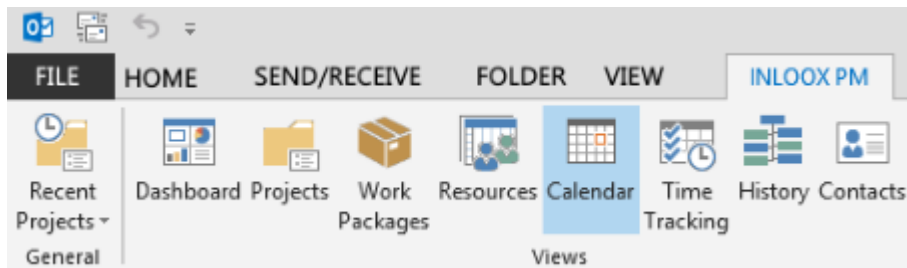
Calendar

Introduction

The Global Calendar displays planning elements (summary activities, activities, milestones and published planning elements) across projects in a combined calendar view.



You find the Calendar on the **InLoox PM** tab in the **Views** group.

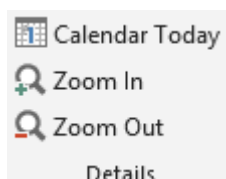


NOTE Users need to have reading permissions (Read project and Read planning) to be able to see the regarding items in the calendar view. If they don't have the necessary permissions, the items won't be visible in the calendar.

Views

On the **Home** tab, in the Global Calendar, there are five different time spans available (day, work week, week, month and timeline).

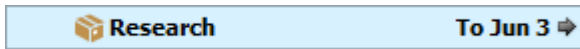
Besides that, you can adjust the zoom levels on the **Home** tab in the **Details** group and open today's calendar.



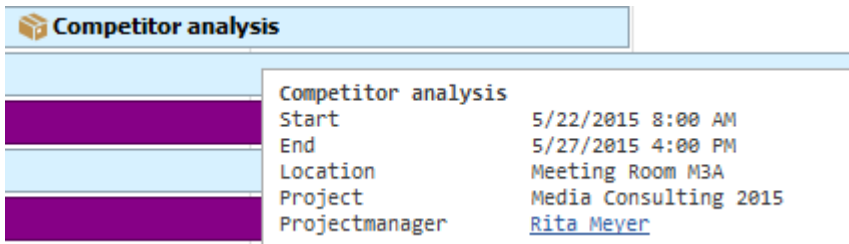
Click on the button **Show time of day** in the Ribbon on the **Home** tab in the **Current View** group to see the exact-to-the-minute start dates and deadlines for each planning element in the calendar.

To see those planning elements that take place in your projects at a certain date click on the **Select date** button in the Ribbon on the **Home** tab in the Current view group.

An icon marks the activities with assigned work packages:



When you hover over a planning element with your cursor, you see a tooltip. It shows at a glance the name of the planning element, its start, end, location, the regarding project and the name of the project manager in charge of the project which will be displayed as a hyperlink. If you click onto that link, you get all the contact information on the project manager.



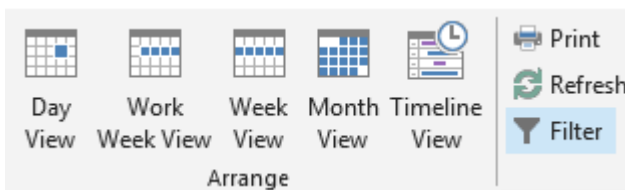
NOTE The tooltip shows the location that is indicated when creating an activity or a milestone – it does not correspond to rooms in Outlook Exchange.

NOTE Working and non-working times in the global calendar depend on the settings you made in the Outlook options in the calendar area.

Create your personal calendar view

You have different options to create calendar views that are a perfect fit for your information needs:

To gain a better overview, you can filter the calendar by the most important planning, project and custom information, e.g. by certain projects or by milestones only.



Please follow these steps to apply a filter to your calendar:

1. Click on the button **Filter** on the **Home** tab in the **Current Views** group.
2. The **Filter Editor** window opens. Now you can select different criteria (e.g. project name, activity, critical and many more), different conditions (equals, is greater than, is less than and many more) and different relational operators (and, or, not or etc.) and confirm your selection by clicking **OK**.

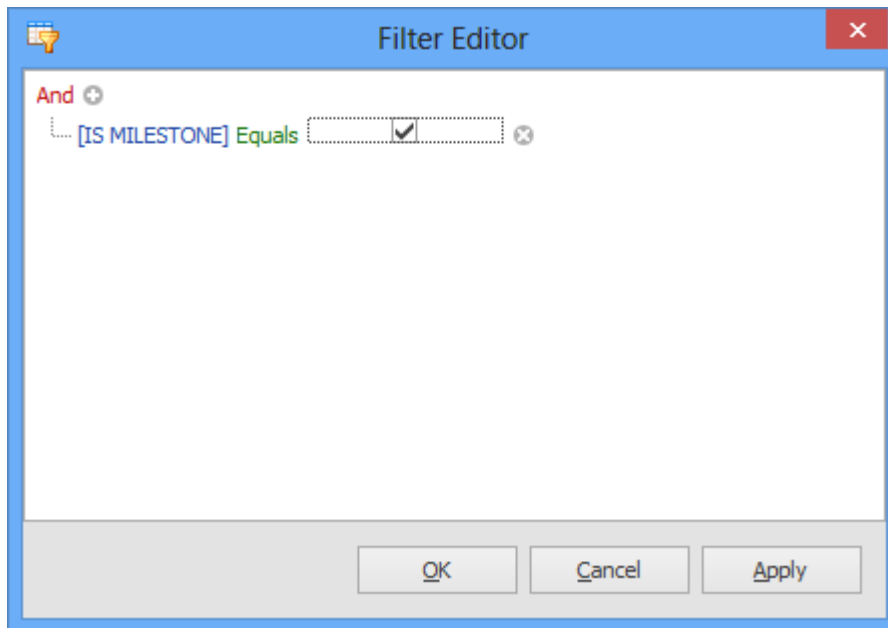
You will now see the filtered calendar view. An active filter is displayed below the calendar. To reset the filter click onto the cross beside the filter.

14	
15	

[IS MILESTONE] = 'Checked'

Application example

Filter by milestones



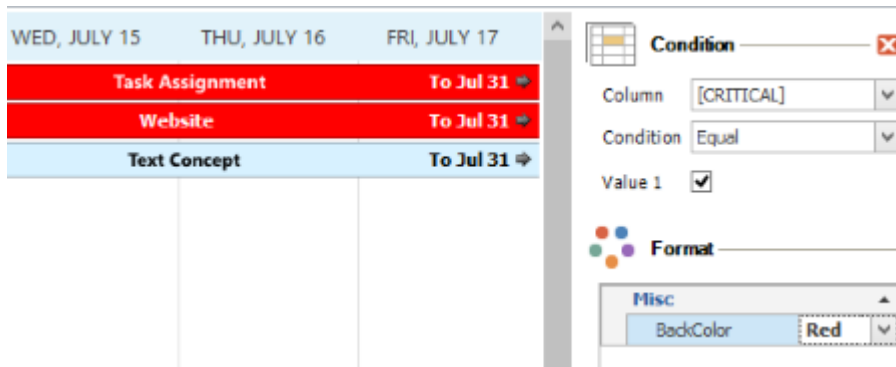
If you only want to view milestones in your calendar, please open the filter. Select “Is milestone” as criterion, “equals” as condition and activate the checkbox. When you confirm your selection by clicking **OK**, you will only see the milestones from your projects in the Global Calendar.

Conditional Formatting

Conditional formatting enables you to highlight certain planning elements in the calendar view according to custom rules – e.g. to keep an eye on critical activities.

And this is how to use conditional formatting using the example of critical planning elements:

1. Click on **Conditional Formatting** in the Ribbon on the Home tab in the **Current View** group, then select **Add Simple Formatting**.
2. A side panel opens where you can edit the conditional formatting. Select “Critical” in the Column section and “equals” as a condition. Activate the checkbox in the value section.
3. Now you can choose a color to highlight critical elements. In the example, we chose red.
4. Now, all critical planning elements in the calendar are highlighted in red.



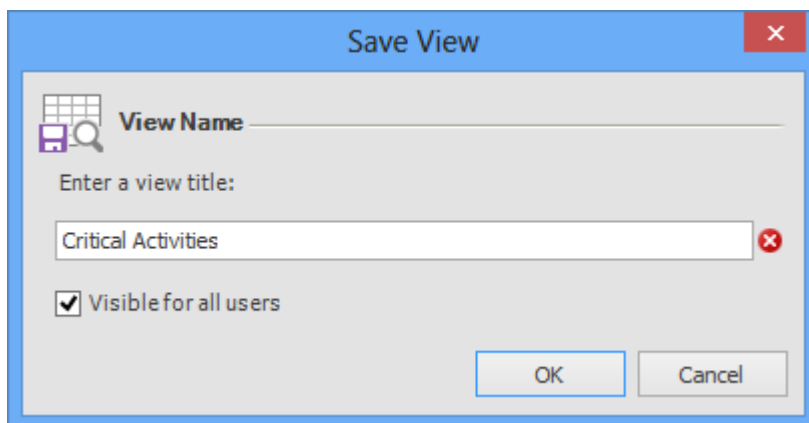
NOTE The color that you select in the conditional formatting section overwrites the color of the element in the Gantt chart.

Save a calendar view

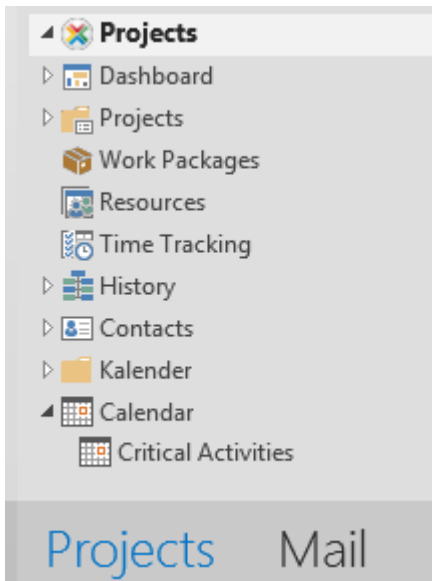
You can save the settings that you made in the Details, Arrange and Current View sections in the global calendar as a view, so that you don't have to make the settings again at a later point.

Please follow these steps to save a calendar view:

1. Adjust the view according to your needs.
2. Then click on the **Save** button in the Ribbon on the **Home** tab in the **Current View** group.
3. The Save View window opens. Now you can choose whether you want the view to be visible only for yourself or for all users.



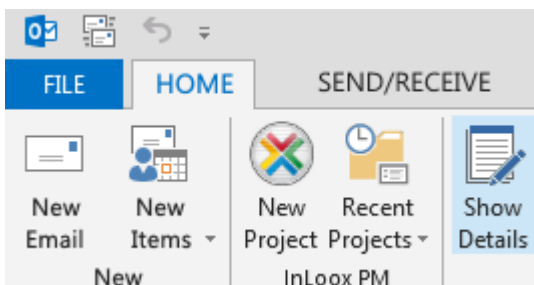
4. You can open the saved view by opening the **Projects** section in the Microsoft Outlook navigation menu. It opens a side panel on the left hand side where you can expand the Calendar section. There you'll find all saved calendar views.



NOTE When the InLoox calendar view is called up again, the last view opened by the user is displayed.

Edit planning elements

To edit a planning element in the calendar view, you can either double-click on it or click on the **Show Details** button in the Ribbon on the **Home** tab. This is only possible if you have the necessary permissions (at least Read project and Write planning).



NOTE It is not possible to edit planning elements directly in the calendar.

The regarding project opens and the planning element that you chose is pre-selected. Now, you can edit it directly in the project.

Synchronize planning elements with Outlook elements

You can synchronize planning elements with Outlook elements directly from the calendar view. And this is how you do it:

1. Mark the regarding planning element in the calendar.
2. In the Ribbon, click on **Synchronize** on the **Home** tab in the **Actions** group and choose whether you want to synchronize the element with your Outlook calendar or your Outlook tasks.
3. After synchronizing it, you will find the element as a calendar appointment in your Outlook calendar or as a task in your Outlook tasks.

Create a new project

This chapter explains step-by-step how to create a new project with InLoox 9 for Outlook. For starting a new project you will need specific user permissions. If you do not have the permission to create a new project yourself, you can submit a project proposal to be approved by your supervisor or project manager. This workflow process provides increased planning security for you and an improved project portfolio insight for the responsible project managers and executives. For more information on permissions browse the articles: [how to set user permissions](#) and [user permission options](#).

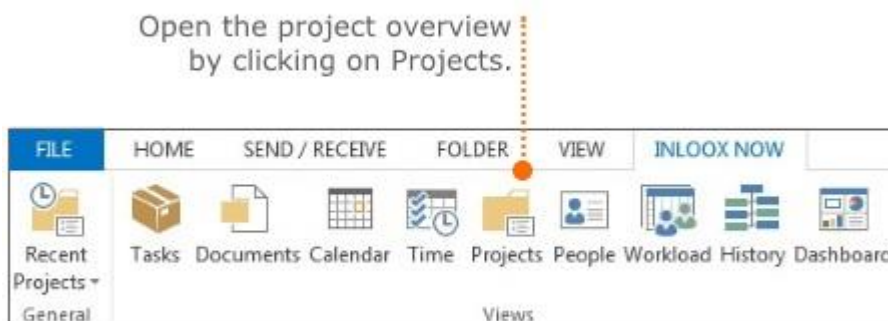
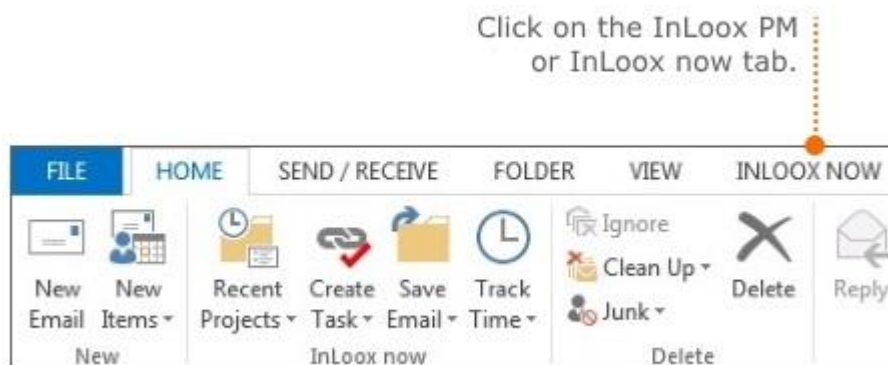
Additionally, you can use the search feature within the projects to easily find specific project information.

Activate the "**Fixed Deadlines**"-Feature on the management page for new or running projects. This highlights all activities that exceed the project end date (defined on the management page) in a red shaded field in the project plan.

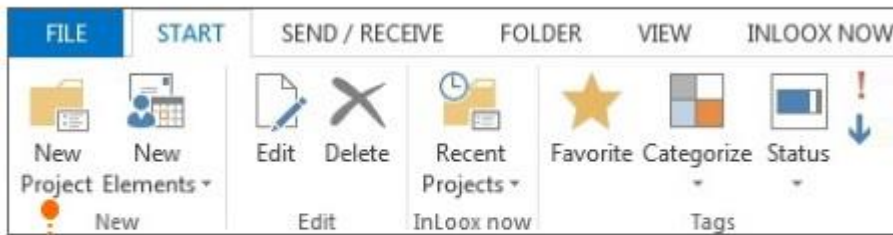
How to create a new project

In the following description we will explain step-by-step how to create a new project with InLoox 9 for Outlook. (Therefore you will need specific user permissions. If you do not have this permission, you can submit a project request.)

1. Start from your Outlook Inbox:



2. After that you can see the project list, which gives you a short overview about all your projects.



To start a new project click on New Project in the start tab.

3. The management form will open.

Here you can enter the basic project information.

- Name your project.
- The **project number** is automatically generated. But administrators can customize the project number and the number format in the InLoox options.
- Choose the responsible **division** and a **category** for your project. Administrators can customize the division structure as well as the project categories in the InLoox options.
- To assign a picture to your project click on the grey InLoox Logo. Locate the picture you want to add and double-click on it.

4. Assign a customer to your project.

Additionally, administrators can edit customers and customer numbers in the InLoox options.

The screenshot shows a 'Project' form with the following fields: Name (Product Brochure), Number (2016-0029), Division (dropdown), and Customer (dropdown). The Customer dropdown is open, showing a list of customers: 0019 Argo Inc., 0020 Trade Fair Company, and a 'Browse...' option. An orange dot is placed on the 'Browse...' option, and another orange dot is on the '0020 Trade Fair Company' entry.

Choose an already existing customer from the drop-down-list ...

... or assign a new customer to the pre-defined customer list.

How to assign a new customer to the pre-defined customer list:

The 'Customer' dialog box is shown. It has a title bar 'Customer' and a close button. Below the title bar is a 'Customer' label and a 'Please select a customer:' prompt. There is a 'New...' button and a table with the following data:

NAME	NUMBER
Software Corp.	0015
Trade Fair Company	0020
Argo Inc.	0019

At the bottom of the dialog are 'OK' and 'Cancel' buttons. An orange dot is placed on the 'New...' button.

After clicking on Browse click on New to create a new customer.

The 'New Customer' dialog box is shown. It has a title bar 'New Customer' and a close button. Below the title bar is a 'Customer' label and a 'Name' field containing 'Media Consulting AG'. Below the name field is a 'Number' field containing 'auto'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. Orange dots are placed on the 'Number' field and the 'OK' button.

Specify the customers' name and click on OK. Now you can use this customer in every project.

5. By assigning project team members (project team, project partners, customers etc.) to the project, your employees will know for which part of the project they are responsible.

By setting up a project team, you define the access permissions for the project. (For more information on how to share permissions or add users to the list, please see Set user permissions.)

Moreover by assigning project roles, you define the role permissions of the chosen person.

Select the project manager and team members from your Address Book (InLoox address book, Microsoft Outlook address book or exchange server address book):

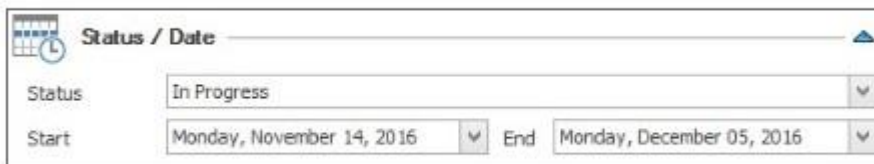
- Select one or more project managers by double-clicking on the entry and click on **OK**.
- Select one or more team members by double-clicking on the entry and click on **OK**.



Role	User(s)
Project Manager	Rita Meyer
Team	Susan Miller ; Martina Baader
Customer	Joel Somers
Partner	
More	

6. Select start and end dates as well as the status of the project.

- Status: Administrators can individually define the project status in the InLoox Options.

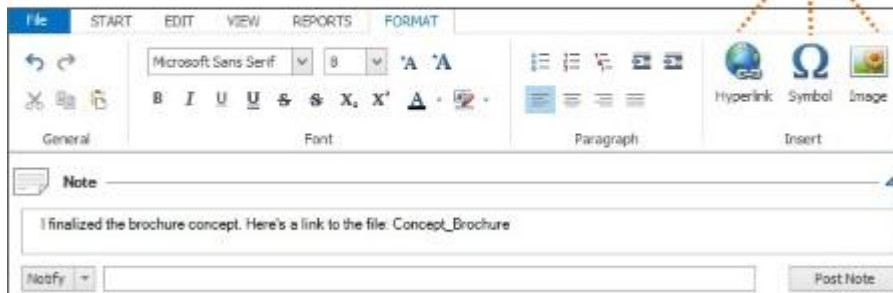


Status	In Progress
Start	Monday, November 14, 2016
End	Monday, December 05, 2016

7. Use notes to leave any additional information on the project.

You can change the appearance of the note with InLoox features on the **Format** tab. Customize your notes with different fonts, colors, sizes etc. ...

Complement your notes with
Hyperlinks, Symbols and Images.



- **Hyperlink:** If you want to link a file, website or picture, mark the relevant part of your note and click on **Hyperlink**. Select the file in the address field or enter the URL of a website. Then click on **OK**.
- **Symbol:** Choose a symbol, which is not on your keyboard or is a special character.
- **Picture:** Browse the folder where the picture you want to add is saved, select the picture and click on **Insert**. You can resize the picture directly in the note.

8. To save your note click on Post Note.

Your file is now linked to the note and can be accessed by pushing the Ctrl-button and clicking on the link.

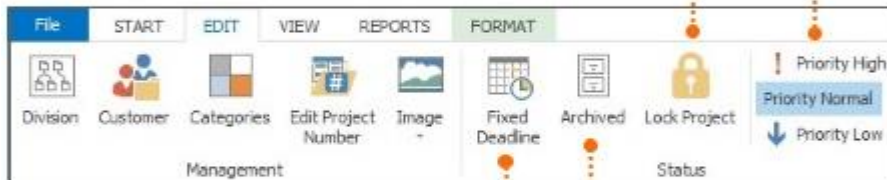
Additionally, you can send your note via email to the project manager or other team members. Click on **Notify** and select a contact from the address book.

Notify: Administrators can define in the InLoox options, if notes are send via email, as Outlook-tasks or as Outlook meeting requests.

9. Add other project information by using InLoox features on the Edit tab:

Set the level of importance for the project.
This enables you to sort projects in the
project list by importance.

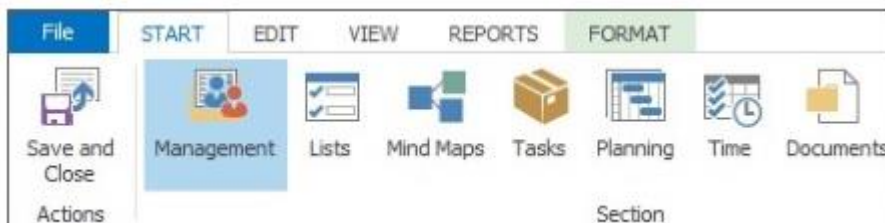
Protect your project from
being changed by other users.



Archive the project.
It will be moved to
the project archive.

Mark the project as a fixed deadline project, like
trade fairs. The project end will be marked in red
in the planning.

10. Click on Save and Close in the start ribbon when you are finished.

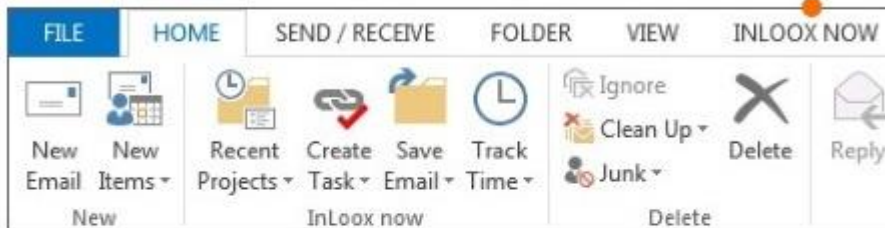


How to submit a project request

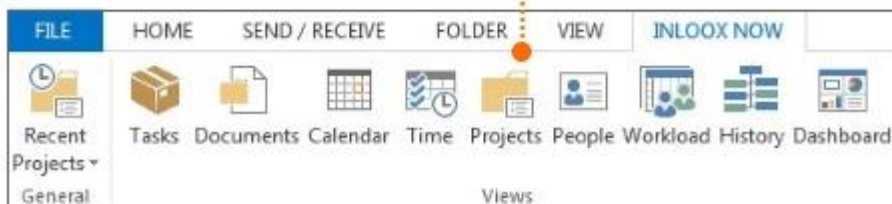
When you don't have the user permission to create a new project, you can submit a project request to be approved by your supervisor or project manager. For more information on permissions browse the articles: how to set user permissions and user permission options. In the following we will explain step-by-step how to submit a project request:

1. Start from your Outlook Inbox:

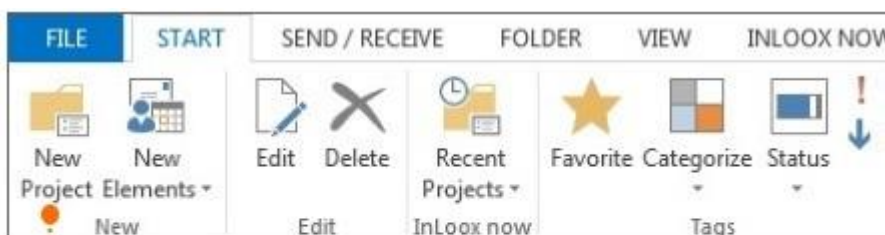
Click on the InLoox PM
or InLoox now tab.



Open the project overview
by clicking on Projects.



2. After that you can see the project list, which gives you a short overview about all your projects.



To open a new project proposal click
on New Project in the start tab.

3. The management form will open.

A notification will pop up (yellow highlight) on the management form to inform you that you are not starting a new project but editing a project request. Click **OK** to edit the new project request.

- Enter the basic project information. Therefore read the chapter How to create a new project.
- Click on the **Reviewer** button in the staff area to select somebody to release your project request. Select the responsible person by double-clicking on the entry in the address book.


4. Click on Safe and Close when you are finished.

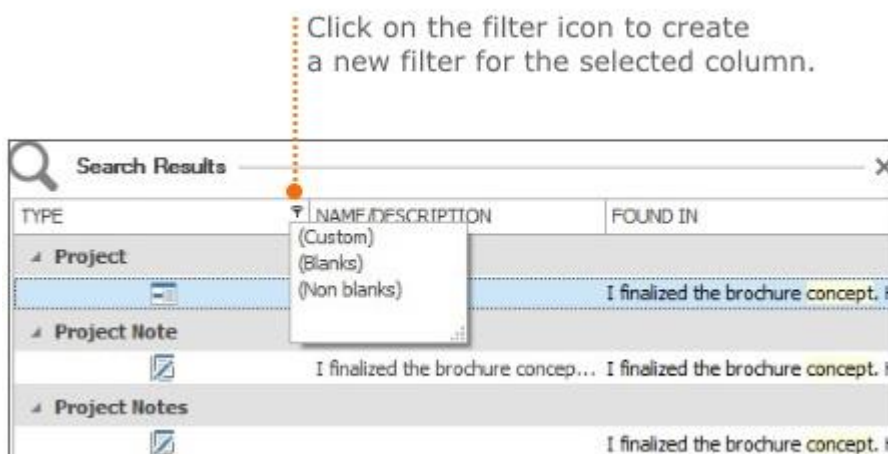
The reviewer you selected will receive your project request submission for approval and the project request will be included in the tree structure of the InLoox project list.



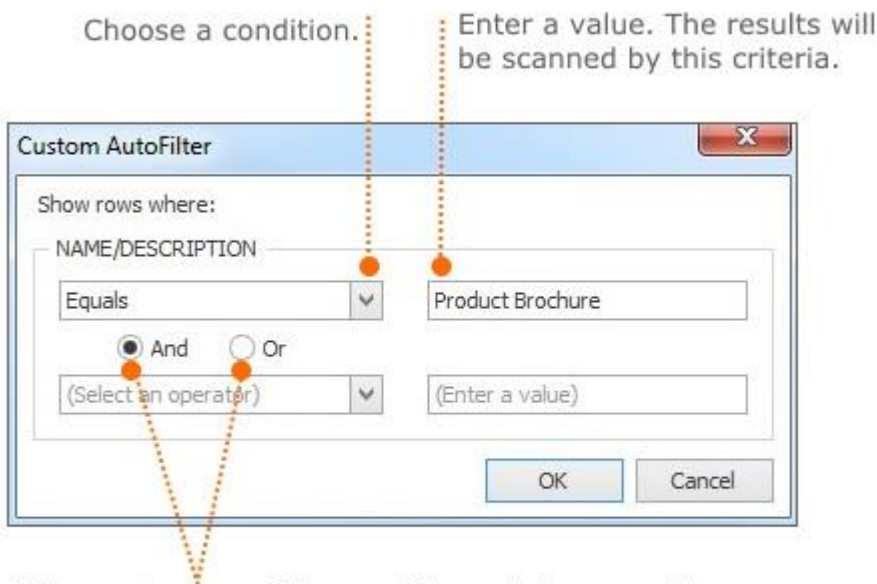
Search and filter project information

InLoox provides you with a search feature within the projects. Thereby you can easily find and access needed data. Scan your projects with appropriate keywords:

1. Enter a keyword in the search box that you can find on the top right of each page. Select **All Pages** on the search tab to scan all project information. To scan just the open page (e.g. Management, Mindmaps ...) click on **Only this Page**.
2. Select enter or click on the search icon . The search results are shown on the right side of the screen.
3. Additionally, you can refine your search by using a filter on one of the search result columns.



4. For creating a customized filter you can define values and logical operators in the dialog box.



When using more filter conditions at the same time, choose between the two logical operators (And, Or). The default filter operator is And.

5. When you are finished click on the discard icon **X** next to the search results' list or click on **Close Search** on the **Search** tab.

Customization

Backup project data

To back up all of your InLoox PM data you can use the correspondent tool producer.

A regular data according to the InLoox PM editions backup is carried out as follows

InLoox PM

edition	Procedure
Personal	It is sufficient to make regular copies of the InLoox PM files on CD-ROM or tape. The data file, which normally has the extension .SDF (SQL Server Database File), must not be opened in any program. The standard name of the file is InLoox.mdf. The file is stored in the InLoox PM installation folder.
Workgroup Server and Enterprise Server	Save the entire InLoox PM database on the server where it is published. You can use any software which supports the backup of databases during operation (scheme and data) and which is suitable for your database system. Unfortunately, it is quite difficult to backup offline copies (database replications) located on the users' 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.

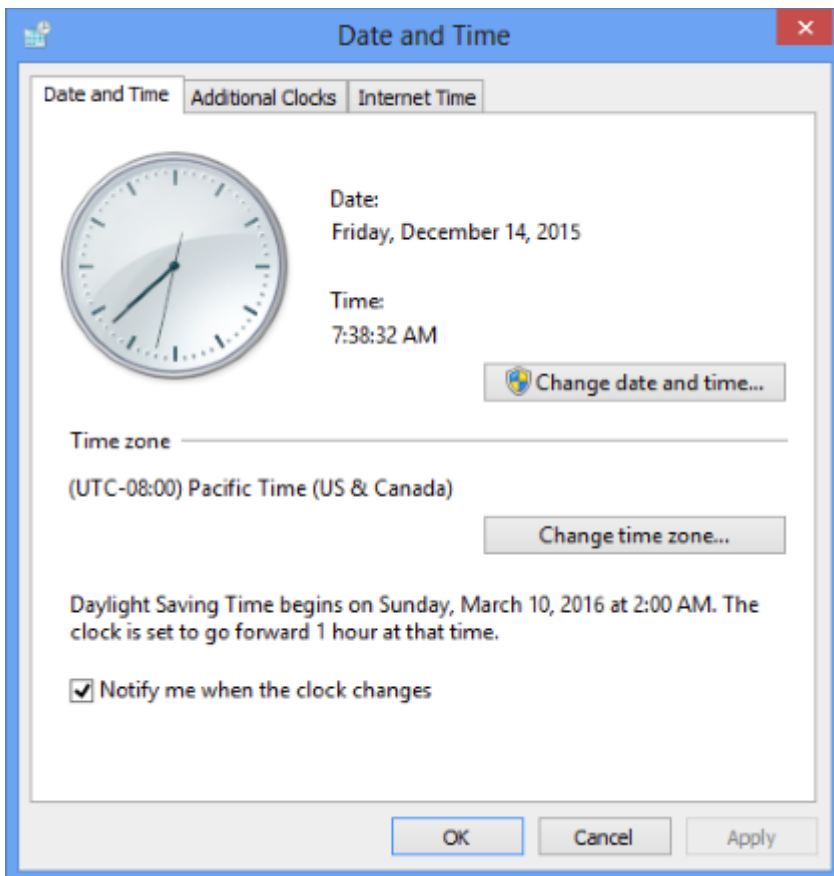
IMPORTANT Documents stored in InLoox PM must be backed up separately. InLoox PM only saves links to these objects, a backup of the InLoox PM database is not sufficient to back up the documents as well. The backup strategy and software depend on the storage location of the documents (files on the local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

Change the time zone

If your team is scattered across various time zones, yet has to work towards a common deadline, you no longer have to do cumbersome time zone conversion. Since InLoox Version 9, InLoox for Outlook references the time zone set on the device you are working with and automatically converts your deadlines for you.

To check which time zone is set on your device or to change it, please follow these steps:

1. Double-click on the **date and time** in the lower right corner of your monitor.
2. Click on **Change date and time...** if you would like to change the settings.



3. Select the suitable time zone. InLoox for Outlook will now convert all the dates and deadlines for you.

Create and edit custom fields

Create and edit custom fields

Note You need administrator rights to create custom fields. Custom fields are available for all InLoox PM versions and for InLoox now! Enterprise version.

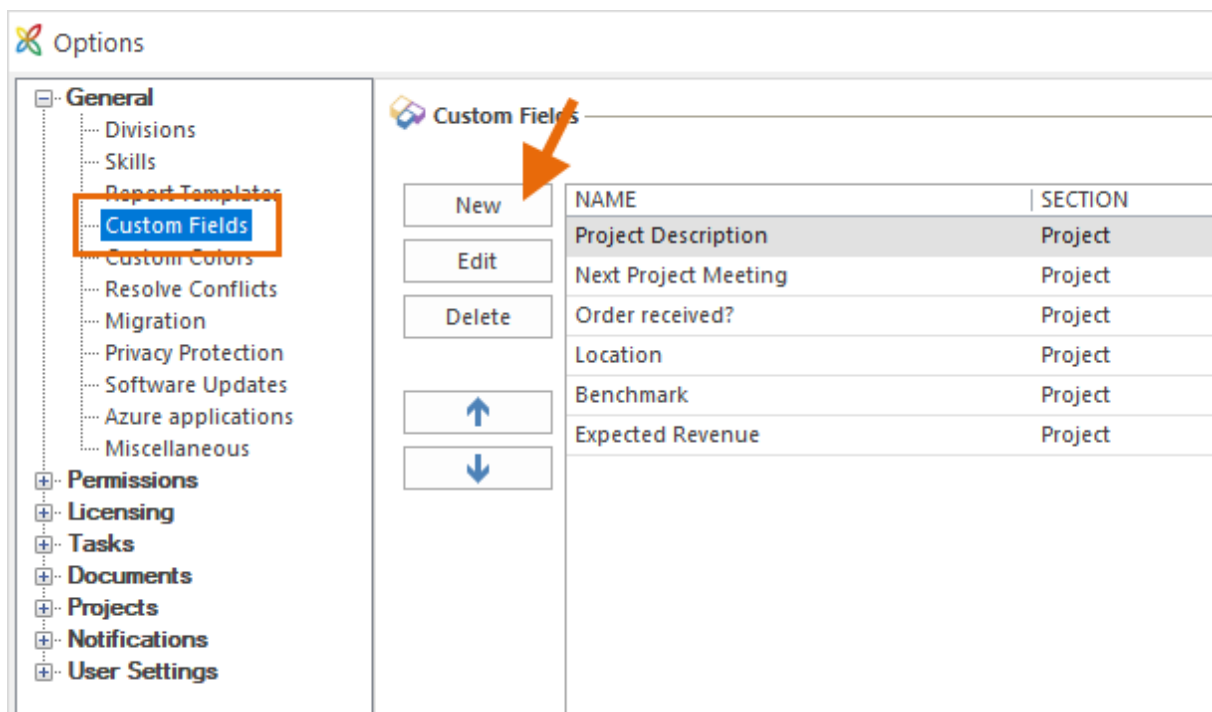
InLoox allows you to create new custom fields either for the entire project or for specific areas in the project:

- Budgets
- Document
- Line item
- Mind Maps and/or Mind Map Node
- Planning
- Project
- Tasks
- Time

You can rename custom fields at any point and as often as you need to. InLoox supports several data types for custom fields and lets you set rules for the display of custom fields. Please find below instructions for creating custom fields in InLoox:

If you have admin permissions for InLoox, you can create your own custom fields for new columns in the planning list. In Outlook, open the by clicking on **File** and on **InLoox Options**.

1. Click on **Custom Fields** and then on **New** to create a new type of custom fields.



The screenshot shows the 'Options' dialog box with the 'Custom Fields' section selected. The 'Custom Fields' section contains a table with the following data:

NAME	SECTION
Project Description	Project
Next Project Meeting	Project
Order received?	Project
Location	Project
Benchmark	Project
Expected Revenue	Project

2. **Name** the new custom field and choose the **Location** where in InLoox the custom field shall be displayed.

New Custom Field

Custom field

Name

Location: Project

Type: Project

Default value: Project

Rule

Always display

Display only if:

Fields

Corrpsonds to regular expression:

OK Cancel

3. Then select the **Type** of custom field. You can choose from **Text**, **Date**, **Integer** (number), **Decimal number**, **Checkbox**, **List**, or **Currency**.

New Custom Field

Custom field

Name: Risk

Location: Project

(List in which the new field will be created)

Type: Checkbox

Default value: Text

Rule

Always

Display only if:

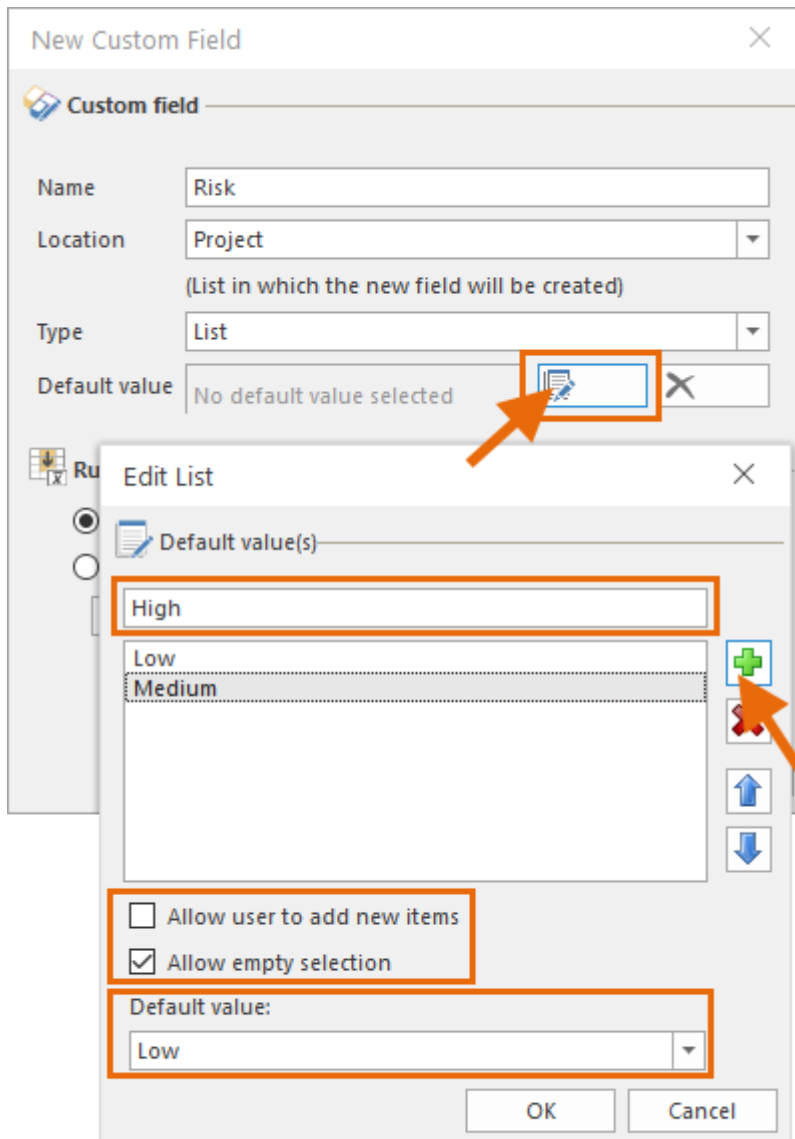
Fields

Corrpsonds to regular expression:

OK Cancel

4. Then enter the **Default value** that will automatically be displayed in the custom field. Click on the edit Symbol to open the window to edit the default value. In this example, the custom field type for

the custom field **Risk** is **List** and the default values are **High**, **Medium**, and **Low**. The InLoox users can select one of these three values in InLoox Projects to highlight e.g. high-risk projects.

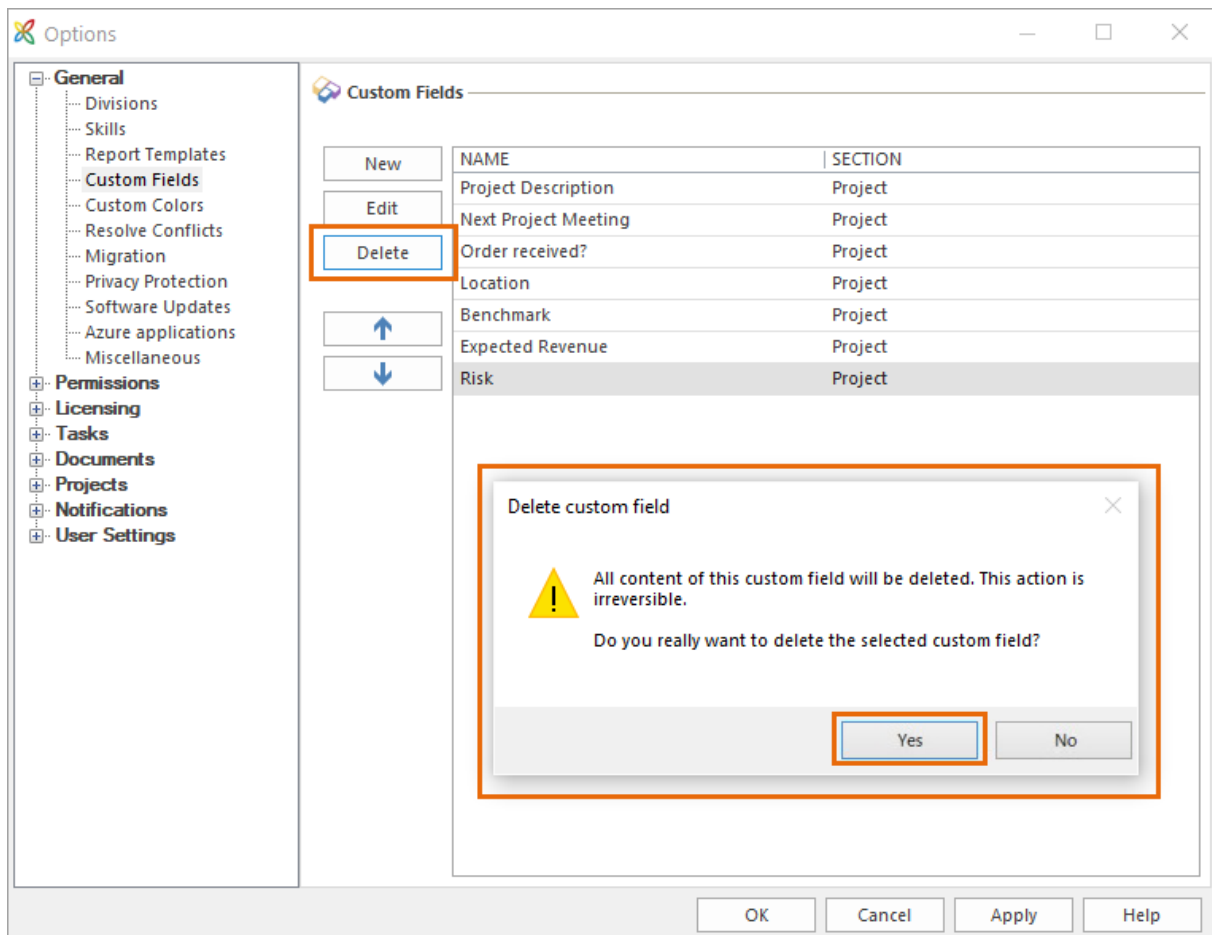


You can allow InLoox users to leave the custom field empty by setting a check mark at **Allow empty selection**.

If InLoox users should be able their own values, set a check mark at **Allow user to add new items**. Beware, however, that allowing this kind of individual customization may cause confusion.

5. Per default, the newly created custom field ist always displayed. If you want to set a rule for this custom field, select **Display only if** and follow the [instructions below](#).

6. If you want to delete custom fields, mark the field in the overview list and click on **Delete**.



Create custom fields according to rules

Note You need administrator rights to create custom fields. Custom fields are available for all InLoox PM versions and for InLoox now! Enterprise

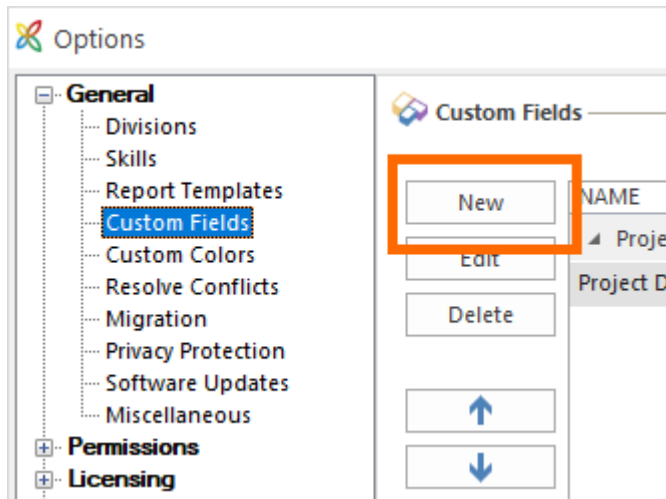
Note Division support is only available in InLoox PM Enterprise and InLoox now! Enterprise

Similarly to the document structure, you can create custom fields according to individual rules. This is convenient because not every field is relevant for every department. If you have a lot of custom fields, it can be difficult to keep track of which fields need to be filled in and which are only optional. With this new feature you can now define which fields are automatically displayed for which department.

Example:

The marketing department often creates documents that go through various feedback rounds before they are released for publication. Here it is convenient to have a custom field in the documents that indicates the editing status of the document. Follow these steps to create this custom field:

1. Open the InLoox options: **File >> InLoox Options**
2. Under **General**, click on **Custom Fields**
3. To create a new custom field, click on **New**



4. The editing window opens

1. Enter a name for your custom field.

2. Select the InLoox section for which you would like to create a custom field.

3. Select a field type.

4. You can determine various values for a field, depending on the field type. E.g. you can add specific list items for the field type **List**.

5. Select **Display only** if if the field should only be displayed in specific cases, e.g. it should only be displayed for a specific department.


6. Select the field which has to include a specific value for the rule to apply.

7. Enter the specific regular expression. E.g. If the field should only be displayed for a specific department, enter the exact name of that department.

1. Give your custom field a unique and easily distinguishable name such as **"Editing Status Documents"**

2. Select the InLoox area in which the field should be placed. In this case, select **Documents**

3. Select **List** as type:

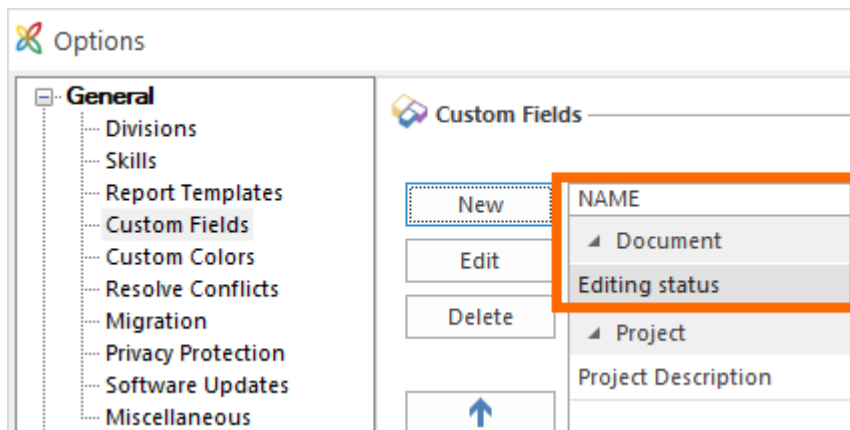
- Click on  to enter the list entries
- For example, the first entry could be **"In Process"**. Confirm with **Enter** or click on the **green plus icon**.
- Other list entries could be **"In Review"** and **"Final"**
- Select which entry should be the default selection, in our case it's **"In Process"**
- Confirm with **OK**

4. Now define your rule. In the editing dialog, select **"Display only if"**

5. Click on **Fields** and **select division**

6. Enter the exact name of the division, i.e. how it is saved under "Divisions" in the InLoox Options - in this case **"Marketing"**

5. Now confirm with **OK**. You will now find the newly created field in the list of custom fields.



Customizing the InLoox PM language files

InLoox PM uses so-called resource files for all texts and messages that are displayed. These are located in the program folder on the InLoox PM client. If you want to adapt the displayed texts and messages to the requirements of your company you have to modify them in the resource files. You can find them in the program folder on the InLoox PM client.

IMPORTANT

- Changing the files can cause problems with the program, especially if data are deleted.
- When you re-install InLoox PM, the client setup will overwrite any changes you have made to the language files.

List of the language files (delivery status)

File name	Contents
InLoox.xml	English, German, Spanish, Italian, French

Please follow these steps to customize the InLoox PM resource files:

1. Close Outlook on the client concerned.
2. Open the relevant language file with the **InLoox PM Resource Editor**. This tool can be found in the Download area of the InLoox website.
3. Make the required changes to the file and save it.
4. Test the changes on the InLoox PM user interface.
5. Distribute the file among other InLoox PM clients as required.

Generate personalized views

Organize, sort, and group projects - e.g. by assigned responsibilities, deadlines, project type, priority, etc. You can save the created project list view and open it again as soon as you use the project list again.

Standard views included in InLoox PM

Use the standard views provided by InLoox PM. These views help you to display data in a flexible way.

TIP Learn more about the other views by default such as timeline, project requests and trash, see The views of the tree structure in the project list.

Generate a personalized view

InLoox PM enables you to save personalized views. Please follow these steps:

1. On the Outlook Ribbon, on the **Start** tab, in the **InLoox PM** group click **Projects**.

NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.
2. Now you can change the view directly in the project list.

TIP For more information on how to do this, see Customize a view in this article.
3. On the **InLoox PM** tab, in the **Views** group click **More Views** and then **Save current view as**.

NOTE In Outlook 2007, click **Actual Views** in the **InLoox PM Toolbar**.

 1. In the **Save View** dialog box, enter a view name.
 2. Activate the **Visible for all users** check box, if you want to share this view with other authorized users.
 3. Click **OK**.
The new view is now displayed in the drop-down list **More Views**.

Use and manage personalized views

This is how you can use a personalized view:

1. On the Outlook Ribbon click **InLoox PM** tab.
2. In the **Views** group, click **More Views**.

NOTE In Outlook 2007, click **Actual Views** in the **InLoox PM Toolbar**.
3. Select a view from the drop-down list, e.g. **Project controlling**.
InLoox PM loads the saved view with customized data in the project list.

Proceed as follows in order to manage views:

1. On the Outlook Ribbon click **InLoox PM** tab.
2. In the **Views** group, click **More Views**.

NOTE In Outlook 2007, click **Actual Views** in the **InLoox PM Toolbar**.

3. Click **Manage Views...** in the drop-down list.
4. In the Views dialog box do one or more of the following:
 - **Edit view** double-click the view you want to edit or click **Edit**.
 - **Remove view** Remove permanently one view from InLoox PM. Choose a view from the list and click **Delete**.

- **Reset views** Click **Reset views**, if you do not want alle changes to be accepted.
- **Export view** Save a view in your local documents. Choose one view from the list and click **Export**.
- **Load view** Load a view from your local data. Click **Import** and choose a view file in the **Import File** dialog box, then click **Open**.
- **Download view** Click **Download** to download an exisiting view template from the InLoox website.

Customize a view

In the Outlook Ribbon, on the **Start** tab, in the **InLoox PM** group, click **Projects** to open the project list. Now you can customize the project list view with the following possibilities.

NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** to open the project list.

- **Sort the information in the project list** Click on a column by which the project list is supposed to be sorted.
The project list will be displayed according to your choice. Click ▲ in the column to sort in rising or in descending order by clicking ▼ .
- **Group the projects according to the selected criterion** Click on a column, e.g. **Status**, by which the project list is supposed to be grouped.
 - Drag a column into the area above the column headers.
The project list will be grouped by the selected criterion. Reset the grouping via Drag and Drop into the project list.
- **Add more information to the project list** Use the **Choose fields** feature to organize the project list by selected information.
 - Right-click on the project list to open the context menu.
 - Click **Choose fields** in the context menu.
 - On the **Choose fields** dialog box, click the field you want to add and drag it into the column headers.

NOTE Reset the fields via Drag and Drop into the project list.

- **Define individual fields** You can implement the workflows for all users with this feature.
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.

TIP For more information see Search and find projects.

Notifications

Notifications simplify the project communication process. You can easily send notifications to any resource via InLoox. In this case it's important to differentiate between InLoox PM and InLoox now!:

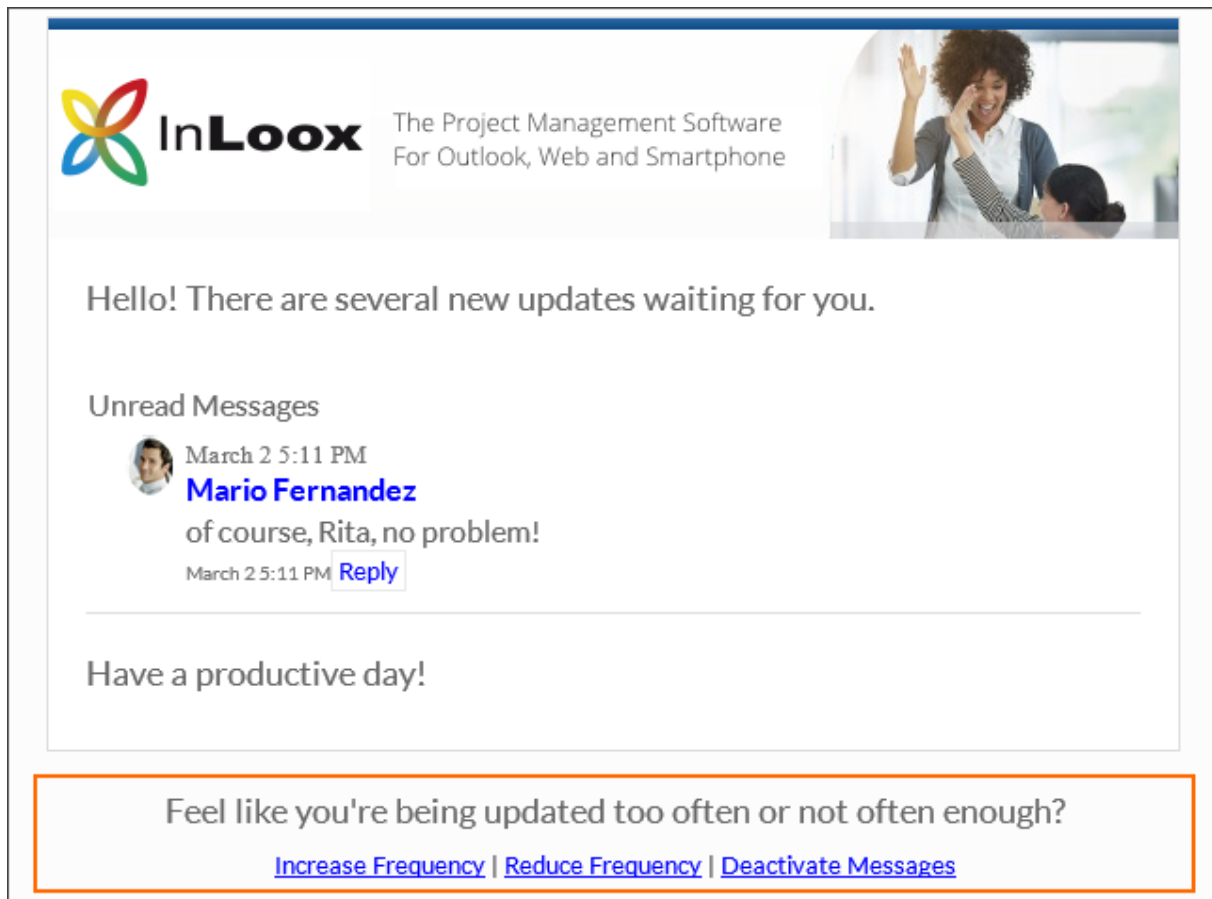
- **InLoox PM:** InLoox PM allows you to manage and customize different notification templates.

- **InLoox now:** InLoox now doesn't allow the customization of notifications, as notifications are predefined by the systems. Only the frequency of notifications can be changed.

InLoox now: Change frequency of notifications

When you are working with InLoox now! the InLoox notifications are predefined by the system. Therefore, only the frequency of notifications can be changed.

InLoox now! sends notifications (e.g. on new tasks) via e-mail. Here you can see an example of an InLoox notification mail:



Basic notification settings directly in the notification e-mail

Basic notification settings can be changed directly in the notification e-mail. At the end of each e-mail you can increase the frequency, reduce the frequency or deactivate messages. Though in the e-mail the frequency can be switched between hourly and weekly only. For detailed settings change to you InLoox now! profile.

Detailed settings in the InLoox now! profile

For detailed settings you have to open your InLoox now! profile. Therefore, proceed as follows:

1. Open InLoox now! in your webbrowser: <https://app.inlooxnow.com/Account/Login>
2. Login and in the upper right corner click on your name and afterwards on **Profile**.

3. A new window will open. In the **Person** tab you can edit the notification settings. Therefore, choose between deactivate, immediately, hourly, daily or weekly.

The screenshot shows a window titled "Rita Meyer" with a close button (X) in the top right corner. Below the title bar are five tabs: "Person", "Contact", "More", "Workload", and "Settings". The "Person" tab is selected. On the left side of the "Person" tab, there is a large orange square containing the white letters "RM". Below this square are two buttons: "Upload Image" and "Random Image", with the word "or" centered between them. To the right of the image area, there are several input fields with labels: "Title", "First name" (containing "Rita"), "Last name" (containing "Meyer"), "Display as" (containing "Rita Meyer"), "Email" (containing "rita.meyer@inloox.com"), "Phone", and "Mobile". Below these fields is a "Notify" dropdown menu, which is open and shows a list of options: "disable" (highlighted in blue), "instantly", "hourly", "daily", and "weekly". At the bottom right of the window, there are two buttons: "Close" and "OK".

4. Afterwards click on **OK**, to save your changes.

InLoox PM: Manage notification templates

Notifications simplify the project communication process. You can easily send notifications to any resource via InLoox.

InLoox PM allows you to manage and customize different notification templates. Whereas in InLoox Now! the customization of notifications is not possible, as notifications are predefined by the system.

InLoox PM provides you with notification templates for the following areas:

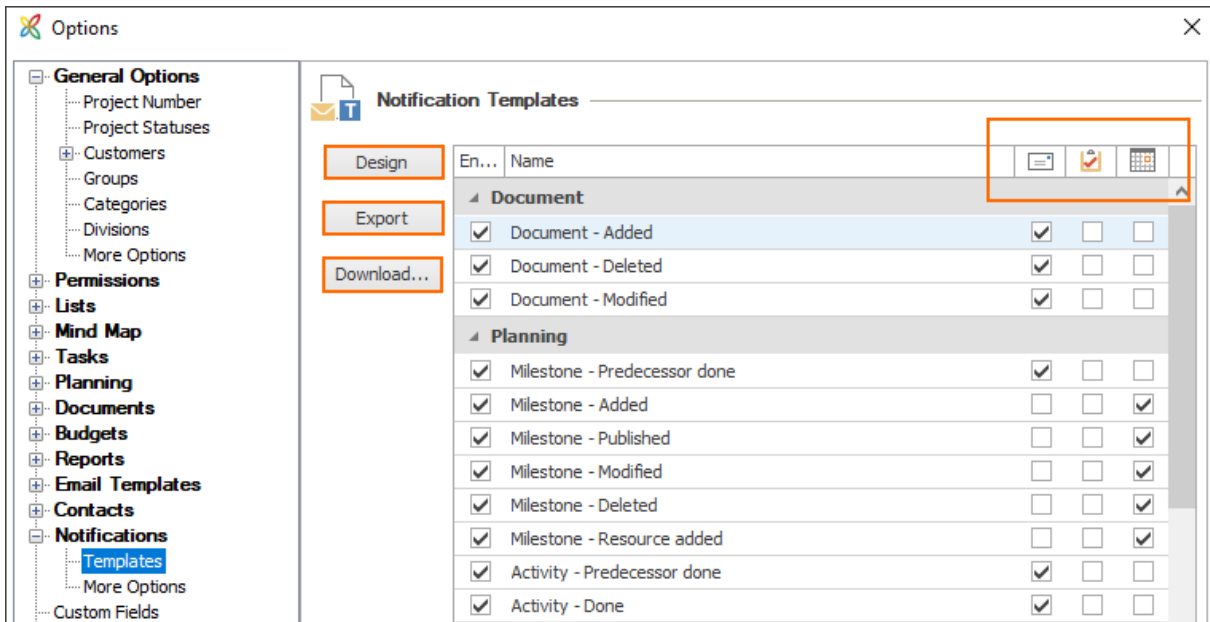
- Tasks
- Documents
- Planning

This chapter is focusing on InLoox PM notification templates!

Introduction to notification templates

To manage InLoox PM notification templates, open the InLoox options:

1. We start from your Outlook inbox. Click on **File** in the left corner and afterwards on **InLoox PM options**.
2. The InLoox PM options will open in a separate window. In this window select **Notifications >> Templates** in the tree structure on the left, to get to the notification template overview.



3. In the overview you can see all notification templates structured into tasks, documents and planning. Additionally, you can define the notification type for each template by using the three icons on the right side (see screenshot).

4. Furthermore, you have the possibility to design, export and download notification templates:

Design notification templates

To edit the content of an InLoox notification template, select the template from the overview and click on **Design**. A new window will open, where you individually design the template. How to work with the InLoox notification designer, will be explained in the next chapter: Customize notification templates

When you have finished, save your changes by clicking on **Apply** in the InLoox options.

Export notification templates

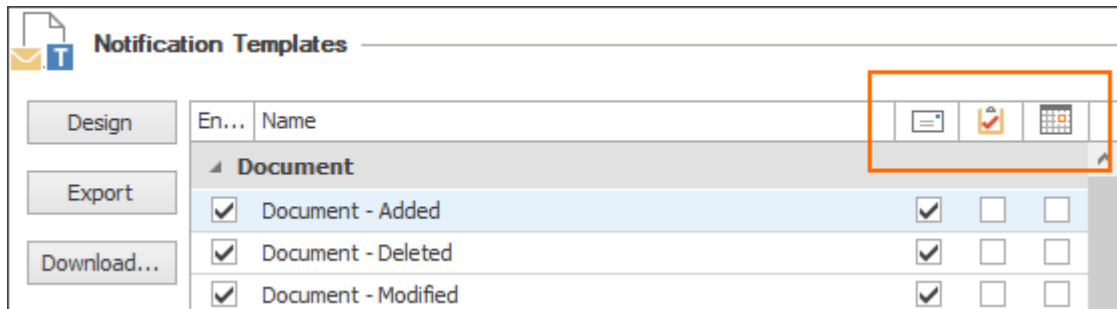
To save a notification template locally on your computer, select the template from the overview >> and click on **Export**. Afterwards select the storage place in the new window and click on **Save**. When you have finished, save your changes by clicking on **Apply** in the InLoox options.

Download notification templates

To download notification templates from the InLoox website, click on **Download**. You will be transferred to the InLoox website, where you select the language (German/English) for your notification templates.

Define notification type

Like we have already mentioned in the introduction chapter, you can define for each notification template different notification types. You can choose between: 1 E-Mail, 2 Task-Request and 3 Meeting-Request.



You can choose only one notification type as well as several notification types at the same time:

1 E-Mail

By selecting E-Mail as the notification type, the resource will be notified via e-mail.

2 Task-Request

By selecting Task-Request as the notification type, the resource will receive a task-request as notification.

3 Meeting-Request

By selecting Meeting-Request as the notification type, the resource will receive a meeting-request as notification.

Default notification templates

InLoox PM provides you with various default notification templates that can be managed in the InLoox options (**File >> InLoox PM options >> Notifications >> Templates**).

You can use the following InLoox PM default notification templates:

Notification	Purpose
Task - done	InLoox PM sends this notification as soon as a task is marked as done.
Task note - added	This notification is created when a new task note is added to a task.
Task - added	This notification is created when a new task is added to one of the following project areas: Tasks , Mind Map or Planning .

Notification	Purpose
Task - resource added	As soon as a resource is added to a specific task, this notification will be sent.
Task - modified	InLoox PM creates this notification as soon as a task is modified.
Task - resource removed	InLoox informs you when a resource is removed from a task.
Task - deleted	This notification is created as soon as a task is deleted.
Task note - deleted	InLoox PM creates this message as soon as a task note is deleted.
Document - added	InLoox PM informs you about new project documents.
Document - deleted	InLoox PM informs you when a project document is deleted.
Document - modified	This notifications is created to notify about modified documents.
Activity - Predecessor done	You receive this notification when a planning element - that is a predecessor - is marked as done in the project plan.
Activity - added	This notification informs about new activities in project plan.
Activity - done	As soon as an activity is marked as done in the project plan you receive this notification.
Activity - modified	This notifications informs about changes to activities in the project plan.
Activity - deleted	InLoox PM creates this message as soon as an activity is deleted from the project plan.
Milestone - Predecessor done	InLoox PM creates this message when a milestone - that is a predecessor - is marked as completed in the project plan.

Notification	Purpose
Milestone - done	As soon as a milestone is marked as done in the project plan, you receive this notification.
Milestone - added	When new milestones are added to the project plan, this notification is created.
Milestone - modified	This notification informs about modified milestones.
Milestone - deleted	This notification informs about deleted milestones.
Project note - added	This message informs about new project notes.
Project note - removed	You receive this notification as soon as a project note is removed.

[Customize/Design notification templates](#)

You can individually customize the default notification templates. Therefore, you can use several fields. A field can be described as a placeholder for specific project information. You can edit the template by deleting or adding fields.

To customize a template, proceed as follows:

1. Open the InLoox PM options and the notification templates area via the tree structure on the left (**File >> InLoox PM options >> Notifications >> Templates**).
2. Select a template from the overview and click on **Design**, to open the notification designer.
3. In the notification designer on the right, you will see the **list of variables**. Click on **Variables**, to see all available fields.

The following fields are available to customize notification templates:

Field name	Description	Content
DisplayName	Display name	Name of tasks, planning elements, documents and project notes.
Description	Description	Multiple-line description of planning elements.

Field name	Description	Content
EndDate	End planning element	End date of the planning element.
Flag	Flag	Highlighting for planning elements (none, green, yellow, red).
GroupName	Group	Indicates the group of the planning element. The group can be a sort criterion or project cost center.
IsProjectEndDateFixed	Fixed deadline project	Specifies whether the project has a fixed completion deadline.
Link	Linked documents	Document paths (text-only) of the planning item.
Location	Location	Free text field. States where the planning element is to be carried out.
PlannerName	Name of planner	The name of the project planner, as stored in Outlook, e.g. Rita Meyer.
Progress	% completed	Completion degree of a planning element in percent. Numeric value between 0 and 100.
ProjectCategory	Project category	Category to which the project belongs.
ProjectCompany	Project company	Free text field of the customer's name in the project.
ProjectEnd	Project end	End date of the project.
ProjectName	Projekt Name	Short, free description of the project. The project name can be used several times.
ProjectNote	Project name	Multiple-line text for important project information.

Field name	Description	Content
ProjectNumber	Project number	Unique number to identify the project.
ProjectPriority	Project priority	Priority of the project.
ProjectStart	Projekt Start	Start of the respective project.
Projectstate	Project status	Specifies the state of project development
PSPCode	PSP code	PSP code = Work Breakdown Structure code. Free text field for identification of phases and milestones in large projects.
ResourceName	Name of resource	The name of the resource or recipient of the message, as stored in Outlook, e.g. Max Schiller.
ResourceList	Resources	List of all involved resources of a planning element, including email address
StartDate	Start planning element	Start date of the planning element.
WorkAmount	Work amount	Work amount, which is done by the recipient resource of the planning element.

Work offline with InLoox for Outlook

Important This feature requires an InLoox PM Enterprise Server or an InLoox now! account.

Starting with InLoox 10, you can easily access your project data offline. As soon as InLoox reconnects to the database (InLoox PM Enterprise Server) or the cloud (InLoox now!), the data is automatically synchronized. Whether the data of the InLoox PM Server respectively the InLoox now data cloud or the data of the client are prioritized in case of processing conflicts can be set in the InLoox options for all users. Read [here](#) how to proceed.

Not the entire database is cached locally on the user's device, but only the data for which the user is authorized is stored. For example: There are 100 projects, but you only have read and edit

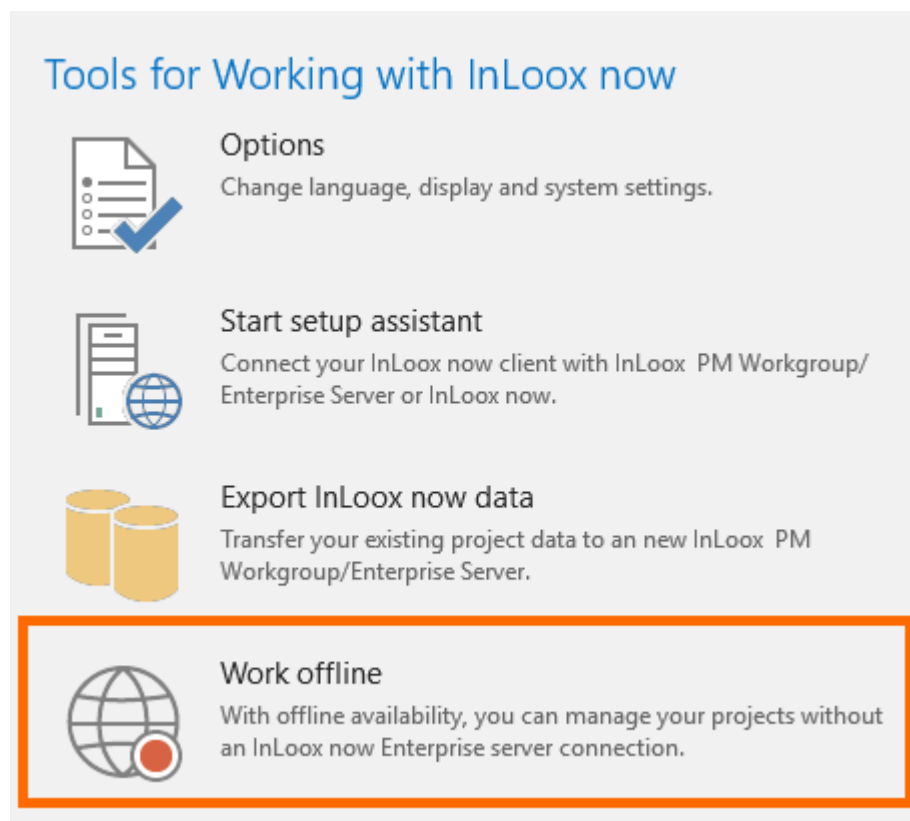
permissions for 20 projects. Then only the data of these 20 projects will be cached for working offline and then again synchronized when you are online again.

For InLoox PM users:

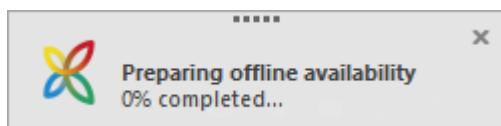
InLoox does not directly fetch or write data from/to the SQL database during the synchronization. The Outlook client communicates with InLoox Web App. Web App only needs to be installed, you do not need to have any Web User or Universal User licenses. The only requirement is that you have an InLoox PM Enterprise Server and install the Web App server.


How to enable offline availability

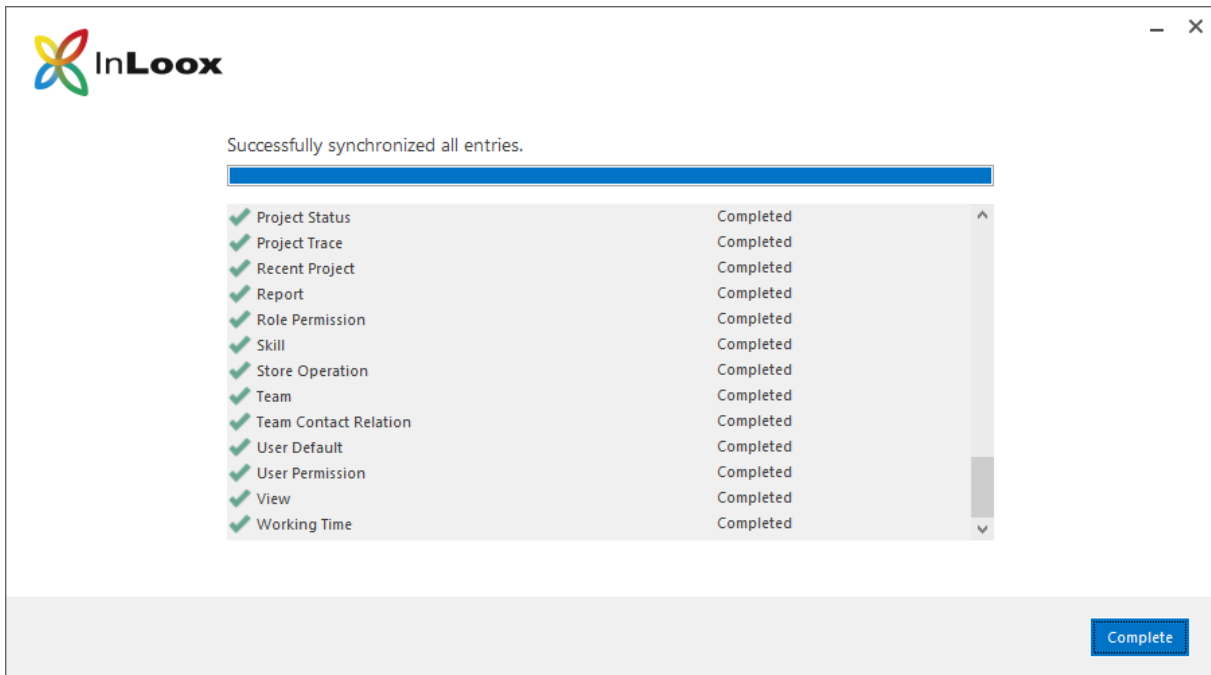
1. Click in Outlook on **File**
2. Click on **InLoox PM or InLoox now**
3. Under **Tools for working with InLoox PM/now**, click on **Work Offline**



4. Offline availability is being prepared. This process can take a few minutes, depending on how much data InLoox has to synchronize.

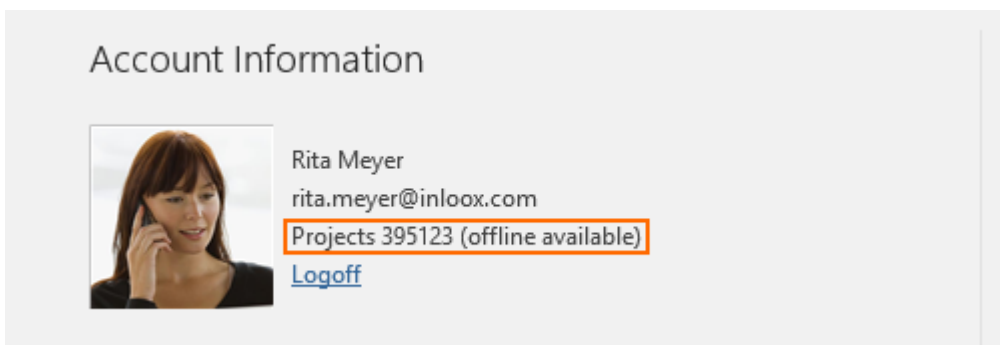


5. To follow the synchronization process, double-click on  in the Windows toolbar to open the synchronization window.



6. Once all entries have been synchronized, you can click on **Complete**.

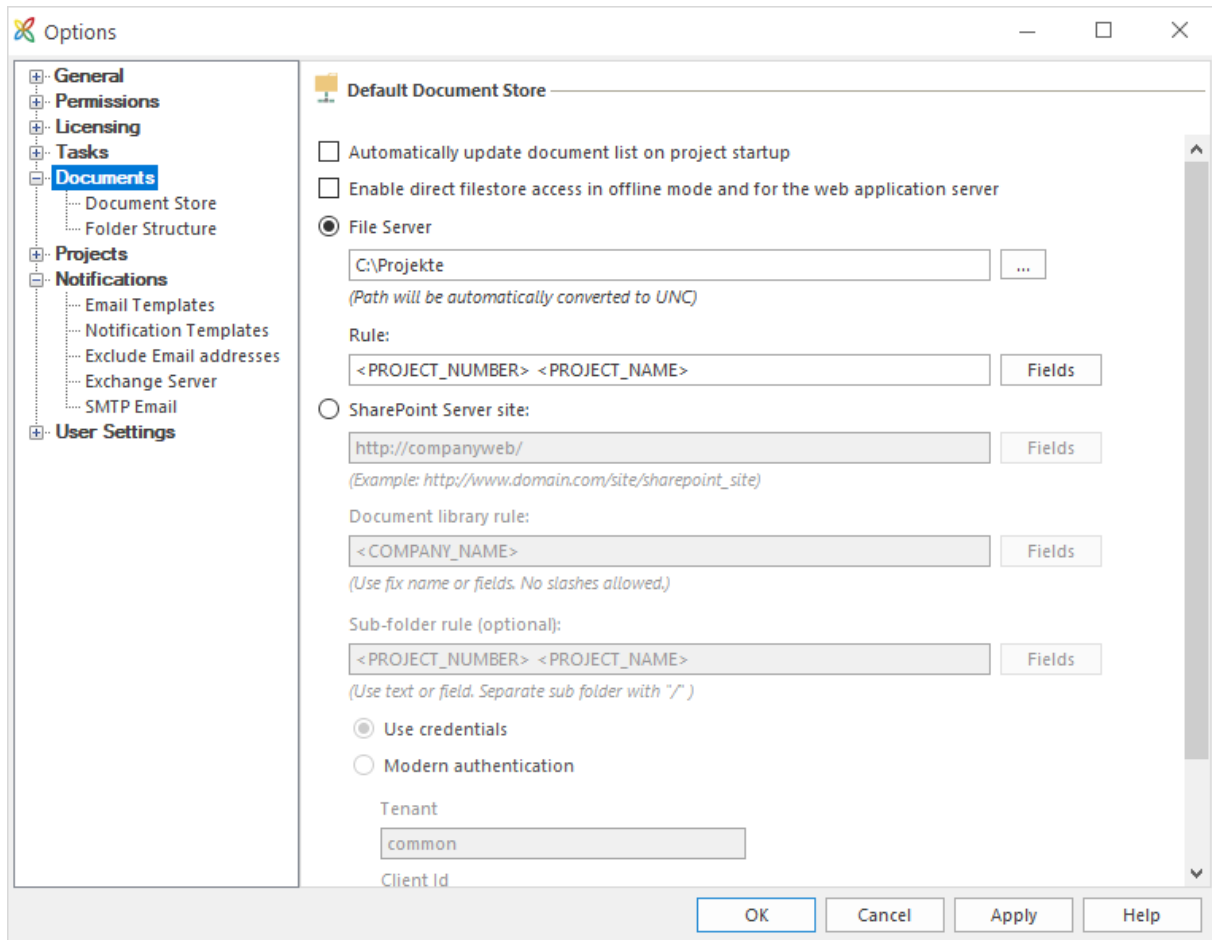
Tip To check whether offline availability is activated, click on **File -> InLoox PM/now**. If the feature is active, **available offline** appears next to the account name under Account information.



When offline availability is enabled: Check settings for default document storage

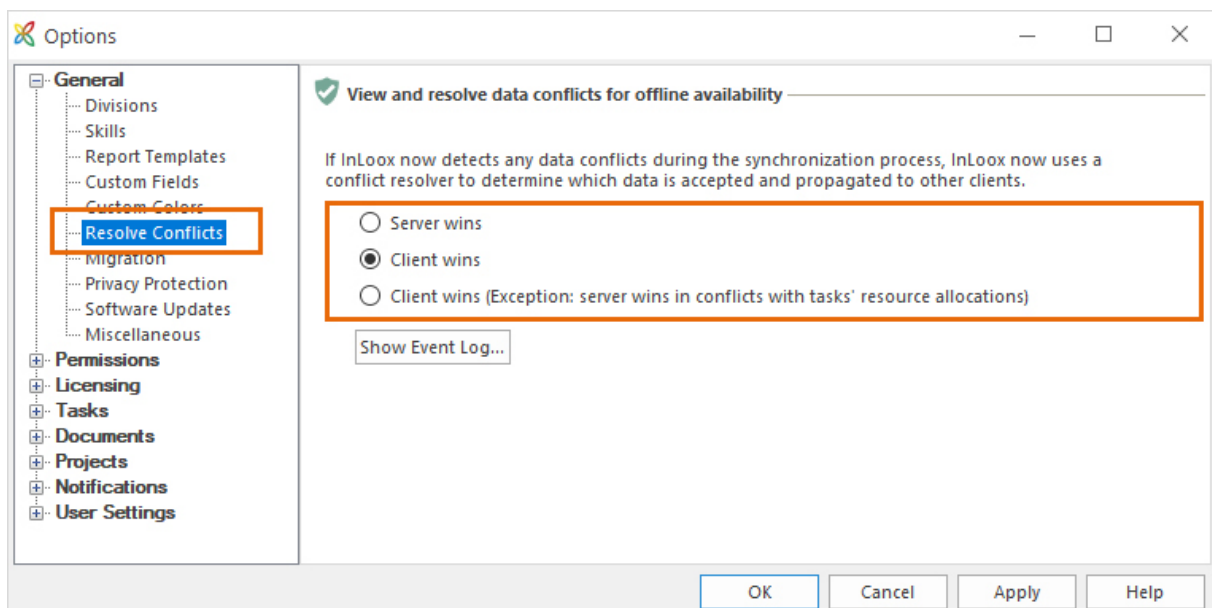
When offline availability is enabled, the download and upload of documents is automatically guided via the web server. If you want to continue to access documents as usual, you need to activate the following setting in the InLoox options:

1. Click on **File** and select **InLoox options**.
2. A new window opens: Click on **Documents** on the left side.
3. Activate the second checkbox "Enable direct filestore access in offline mode and for the web application server".
4. Click on **Apply** and **OK** to save the setting.



Conflict resolutions settings

NOTICE You specify these settings in the InLoox options. For this you need administrator permissions. By default, client-side changes are preferred for resolving editing conflicts during the synchronization of the same online and offline data entries. You can change this default setting in the InLoox options under **General >> Resolve Conflicts**.



Server wins: Select this setting if the data available on your InLoox PM Server or in InLoox now! cloud should be prioritized. If changes to the same data row are detected during synchronization, the data from the client is NOT transferred to the database or cloud. (Existing online data wins)

Client wins: Select this setting if, in the event of a processing conflict of the same data row, the changes from the client are to be adopted during synchronization in the database or cloud. (New offline data wins)

Client wins (exception: Server wins in conflicts with resource allocation for tasks): In this case all data of the client will be accepted, except those in the data row "resource" in tasks. This means that the resource assignment of tasks cannot be changed by the client, but the status of the task and other data can. (New offline data wins, except changes to the resource allocation of tasks)

Display event log

If errors occur during synchronization, they are displayed in an InLoox notification window. If you click on it, the event log opens and displays these errors. In this case, please contact your administrator or IT manager to ensure that a connection to the InLoox PM Server or InLoox now! cloud can be established.

Dashboard view

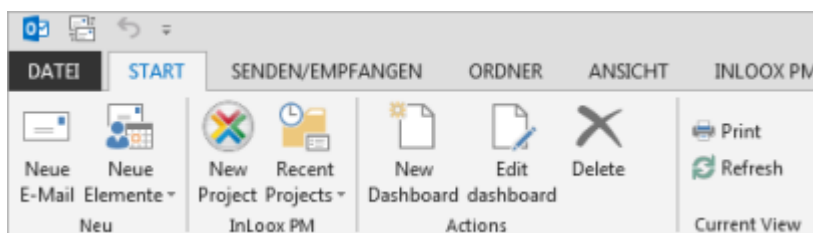
Adjust the dashboard view

The dashboard view shows you the main project areas. You can get all important information to the current projects without opening one and compose your own dashboard view from the different widgets.

- To open the dashboard view, do one of the following.
 - Click **InLoox PM** tab on the **Outlook Ribbon** and then **Dashboard**, in the **Views** group.

NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Dashboard** in the InLoox PM project list.

- Click **Dashboard** in the tree structure on the left.



- On the **Start** tab, perform one or more of the following actions:
 - Create a personal dashboard view**
On the **InLoox PM Ribbon**, in the **Start tab**, in the **Current View** group, click **Widgets**.
 - Edit an existing dashboard view**
Select one view from the tree structure on the left and click **Edit dashboard**, in the **Actions** group.

- **Remove an existing dashboard view**
Select one view from the tree structure on the left and click **Delete dashboard**, in the **Actions** group.
- **Print a dashboard view**
Select one view from the tree structure on the left and click **Print**, in the **Current View** group.

TIP For more information about printing, see General features and print of the project list, in the **Print in the project list** area.


- **Refresh**
All changes are updated and the view is reloaded when clicking the **Refresh** button in the **Current View** group.

Information rules in the dashboard view

In the dashboard view on the side panel you can filter the project information by clicking on certain project from the list.

Symbols in the dashboard view

 Clear filter.

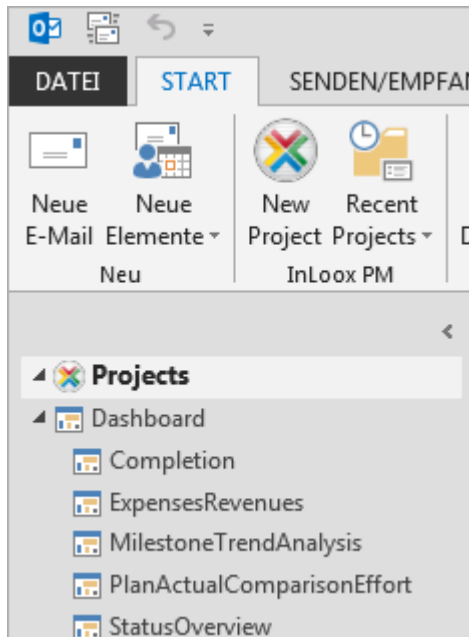
 Dashboard parameter.

TIP More information about parameters you can find under [Using von dashboard parameters](#).

 Export feature. The view will be exported as PDF or image

Dashboard standard views

The InLoox PM dashboard provides you with the standard views about all relevant and project-related information to analyze, control and compare your projects. You have always all key data, developments and target values at a glance - up-to-date and clearly designed.



Create your personal dashboard with an individual selection of widgets. The dashboard provides you with a graphical overview and lists.

TIP Create your personal dashboard. For more information, see [Create new dashboard](#).

In this table you find the descriptions of the standard views to monitor the project information.

Widgets	Description
Expenses/revenues	Shows the system-wide all planned expenses and revenues compared with the actual values. The dashboard provides you with different time views - month, quartet and year.
Percent complete	<p>This dashboard displays the comparison between the planned and actual percent complete.</p> <p>The planned percent complete is defined as (the sum of the work effort all work packages in the planning (work packages < today)) / (the sum of work effort all work packages in the planning).</p> <p>The actual percent complete is defined as (the sum of the work effort all done work packages) / (the sum of the work effort all work packages)</p>
Milestone trend analysis	Represents the analysis of the dates in a project and compares them with the planned data. The dashboard visualizes the date delay of the milestone in the project. With this view you can quickly see the deviations from the planned schedule.
Project status overview	Shows an overview of the progress and the cost-effectiveness of your projects.

Widgets	Description
Plan/actual comparison	Shows planned and actual hours of your projects.

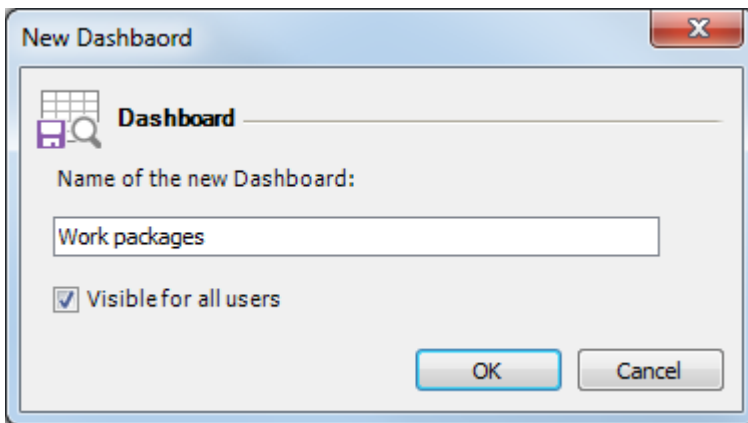
Create a new dashboard

To open the dashboard view, do one of the following.

1. Click **InLoox PM** tab on the **Outlook Ribbon** and then **Dashboard**, in the **Views** group.

NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Dashboard** in the InLoox PM project list.

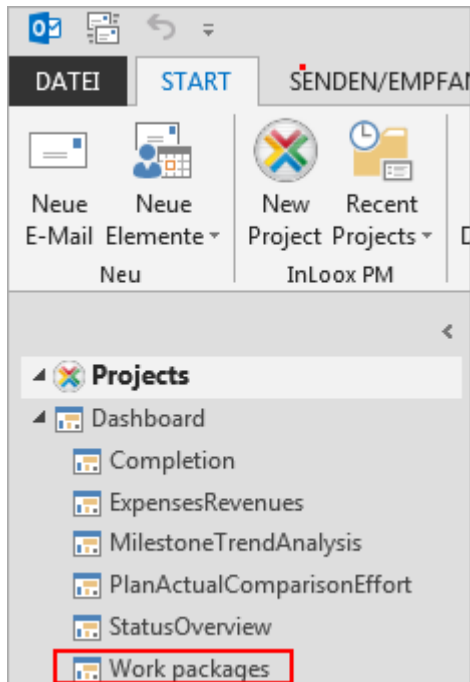
2. Click **Dashboard** in the tree structure on the left.
3. In **InLoox PM ribbon**, on the **Start** tab, in the **Actions** group, click **New Dashboard**.
4. In the **New Dashboard** dialog box enter a name.



5. Activate the check box, if you want to make your dashboard visible for all users.
6. This will invoke the **Dashboard Designer** dialog box.

TIP For more information about it, see Designing dashboard.

7. Wenn the new dashboard is ready, click **Save and Close** in the **Dashboard Designer**, on the **Home** tab.
The new view is displayed in the **Dashboard** tree view on the left.



Designing dashboards

This section guides you through the process of creating a dashboard.

To open the Dashboard Designer, click **New Dashboard** or **Edit dashboard** on the **Start** tab.

The following topics are available:

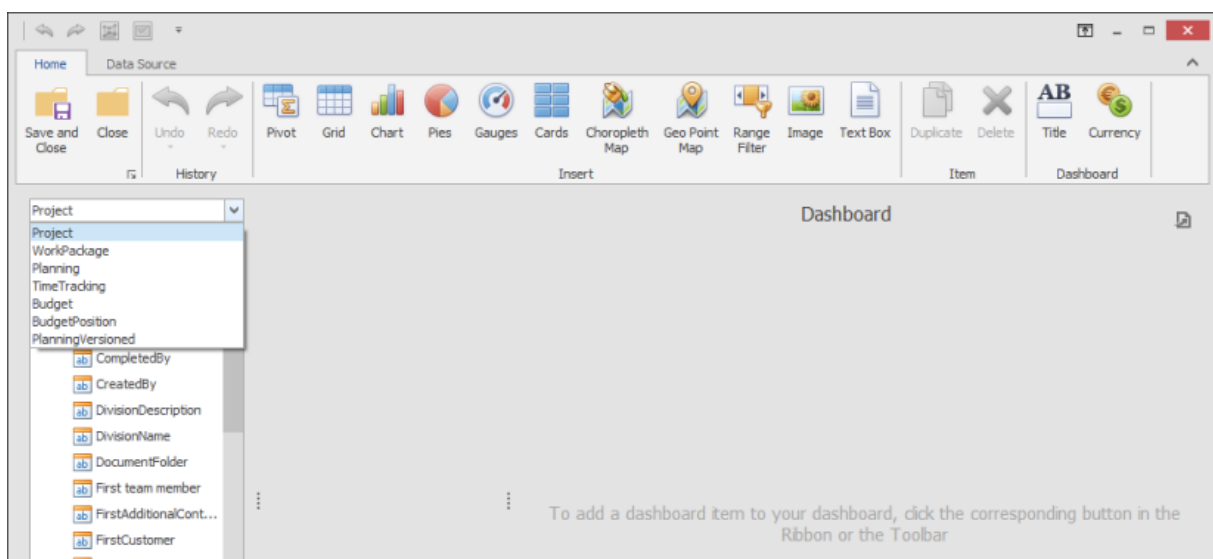
Getting started

In this lesson, you will learn how to create your dashboard using the **Dashboard Designer**.

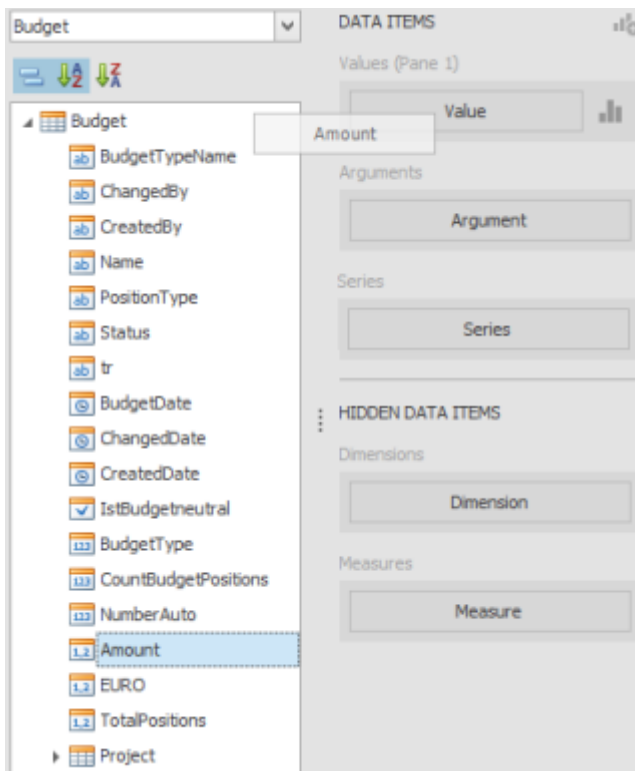
1. First, open the **Dashboard Designer**.

TIP The first steps into creating a dashboard and opening a Dashboard Designer you will find in the topic Create a new dashboard.

The dashboard designer should appear as follows:



2. You can use **InLoox PM Database** or connect to another one.
 - The InLoox PM data source is on the left site panel of the window. You can choose between different data sources as **Project, Work Packages, Planning, Time Tracking, Budget** and **Budget Position** from the drop-down list.
 - Learn how to create a new data source, see [Creating a data source](#).
3. Create **Dashboard Items** and **Bind** them to **Data**.
Learn by example how to create a **Comparison of budget types** dashboard view.
 - The description of the dashboard items you can find here [Creating dashboard items](#).
 - To learn how to bind required data, see [Binding dashboard items to data](#).
3. Click the wanted dashboard item on the Ribbon, e.g. **Chart**.
4. Select **Budget** in the InLoox PM **Data Source Browser**
5. Drag the **Amount** field to the **Values** placeholder in the **Values** section.



6. Then place the **Name** and **Number** fields (for projects) in the **Arguments** section.
7. After drag the **Name** field (for budget types) in the **Series** section.

Click **Save and Close** on the Ribbon. The dashboard view **Comparison of budget types** is now ready.

Creating a data source

The **Create data source** wizard allows you to create a new data source by specifying the required connection parameters (for instance, the server name, the database name, user credentials, the path to a data file, etc.).

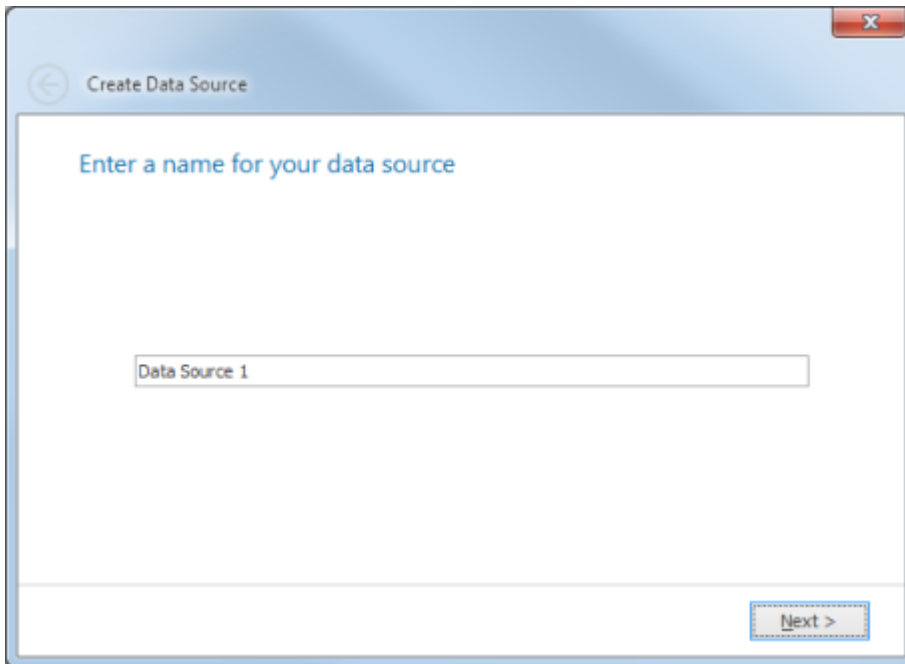
Creating a data source and connecting to data

You can connect to various types of databases and data files using the **Create Data Source** wizard. This wizard allows you to establish a connection to the data store by providing the required connection parameters.

NOTE InLoox PM provides you with its own project data sources on the side panel left in the dashboard designer.

Create Data Source Wizard

1. **Data Source Name** On the first page, enter the data source name and click **Next**.



2. **New or Existing Data Connection** On this page, specify whether to use one of the existing connections or create a new connection, and click **Next**.

NOTE This page only appears if you have already established a data connection in the current application.

3. **Connection Parameters** If the application has not yet been connected to a database, or you have chosen to create a new connection in the previous step, the connection parameters page will be displayed.
 1. First, select the required data provider from the **Provider** combo box. The Data Access library supports more than a dozen different data providers, including MS SQL Server, MS Access Database, Oracle and MySQL.
 2. The other settings on this page depend on which data provider is used. Typically, you will need to specify the server name or the path to the database file, the user credentials, and the database name.
 3. Finally, specify the name of the new connection in the **Connection name** field and click **Next**.
4. **Finish** On the last page, you can select a table or a view. The data from the selected table or view will be used in your application.

1. Click **Finish** to close the wizard. Optionally, you can run the **Query Designer**, which will help you populate the new data source with data. To do this, check the **Open Query Designer after closing the wizard** check box before finishing.

Creating a data source in OLAP mode

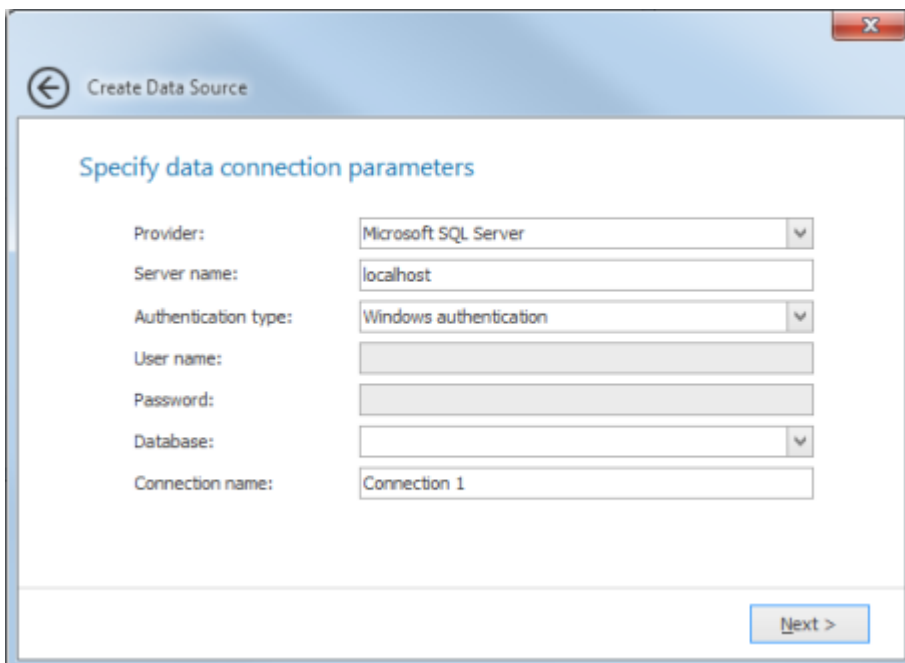
To bind to an OLAP cube in a Microsoft SQL Server Analysis Services database, do the following.

1. On the first page, enter the data source name and click **Next**.
2. On the next page, select **Microsoft SQL Server Analysis Services** from the **Provider** combo box.
 1. Specify the server name and user credentials, and select the catalog and cube name.
 2. Next, specify the name of the new connection in the **Connection name** field and click **Next**.
3. On the last page, click **Finish**.

Composing a data source

InLoox PM Dashboard provides the Windows Forms control that can solely constitute a comprehensive designer application.

The Dashboard Designer provides an easy-to-use wizard that helps you configure a connection to the database.



The screenshot shows a 'Create Data Source' wizard window. The title bar says 'Create Data Source'. The main heading is 'Specify data connection parameters'. The form contains the following fields:

- Provider: Microsoft SQL Server
- Server name: localhost
- Authentication type: Windows authentication
- User name: (empty)
- Password: (empty)
- Database: (empty)
- Connection name: Connection 1

A 'Next >' button is located at the bottom right of the form.

After the connection has been established, use the Query Designer to select data that will be used in the dashboard.

Designing dashboard items

1. To populate the dashboard with charts, pies, gauges and other elements, just click the desired data items in the Ribbon.



2. Drag-and-drop data that you wish to display within each item into a **Data items** area.
3. Now the dashboard is ready.

TIP Learn more about dashboard items. See [Creating dashboard items](#).

Providing data

The topics in this section describe how to provide the data to be visualized in the dashboard.

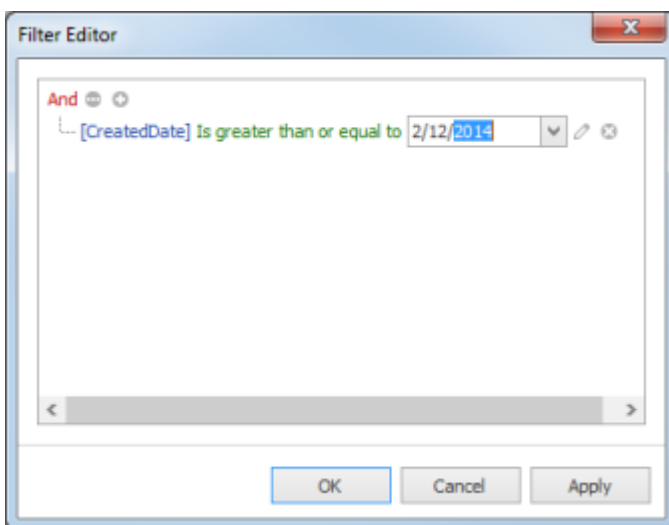
This section contains the following topics.

Data source filtering

Apply filtering

To apply filtering to a data source, click the **Filter** button in the **Data Source** tab.

This will invoke the **Filter Editor** dialog, which allows you to build filter criteria.



TIP To learn how to work with the Filter Editor, see the section [Filter data via the filter editor](#) in the [Search and find in projects](#) topic, in [Use filters](#) section.

To clear the data source filter, use the **Clear Filter** button in the **Data Source** tab.

Passing Parameter Values

You can use the **Filter Editor** to filter a data source according to the current parameter value.

TIP To learn more, see the [Passing Parameter Values](#) topic.

Filtering Limitations

The limitations of a data source filter are as follows.

- Filtering cannot be applied to a data source created in SQL View. You need to include the required conditions to the WHERE clause when editing a data source.
- OLAP data sources do not support filtering.

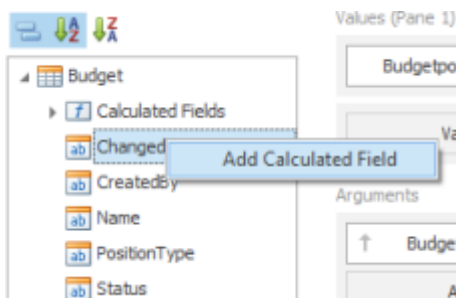
Calculated fields

This document describes how to add calculated fields to a dashboard data source. Calculated fields allow you to apply complex expressions to data fields that are obtained from the dashboard's data source.

Creating a calculated field

After you have created a data source using the Create data source wizard, you can add a new calculated field based on the existing data source fields.

1. To create a calculated field, select the required data source in the **Data Source Browser** and click the **Add Calculated Field** button in the Ribbon's Data Source tab.
Or right-click the **Data Source Browser** area and select **Add Calculated Field** in the context menu.



This invokes the **Expression Editor** dialog, which allows you to specify an expression that will be used to obtain calculated field values. Here you can construct the required expression.

2. After the expression has been specified, click **OK**. This displays a new calculated field in the data source structure.
3. Now you can specify the required calculated field type, change its default name, etc.

Editing a calculated field

To edit a calculated field, use its context menu.

This menu contains the following items.

Item	Description
Edit Expression	Invokes the Expression Editor dialog, which allows you to change an expression for an existing calculated field.

Field Type	Specifies the type of the calculated field.
Rename	Changes the calculated field name.
Delete	Removes the existing calculated field from the data source.

Using dashboard parameters

You can use **dashboard parameters** when it is necessary to pass data of a certain type to a dashboard (e.g., to pass a specific value to the data source filter string or a calculated field).

The topics in this section describe how to use dashboard parameters.

Creating parameters

This topic explains how to create a new dashboard parameter and specify its settings.

To create dashboard parameters in the Dashboard Designer, do the following.

1. Click the **Parameters** button on the Ribbon's Data Source tab.
2. In the invoked dialog, click the **Add** button to add a new parameter.
3. Specify the following settings:

Settings	Description	API
Name	Specifies a parameter name.	Parameter.Name
Value	Specifies a parameter value.	Parameter.Value
Type	Specifies the parameter's type.	Parameter.Type
LookUpSettings	Specifies the parameter's look-up editor settings.	DashboardParameter.LookUpSettings
Description	Specifies the parameter's description displayed to an end-user.	DashboardParameter.Description
Visible	Specifies whether a parameter's editor is visible within the Dashboard Parameters dialog.	DashboardParameter.Visible

Then, click **OK**, to include the created parameters in the dashboard.

Look-up editor settings

There are three types of look-up editor settings that can be specified for a parameter. Select the required type from the **LookUpSettings** drop-down list.

- **No Look-Up** - set the **Value** to use a static value as a parameter.
- **Static List** - click the ellipsis button to add static values for the current dashboard parameter. In this case, the **Value** specifies the default parameter's value.
- **Dynamic List** - allows you to use a list of values from the existing data source as a parameter. You need to select the required **DataSource** from the list of available data sources and data members for the dashboard parameter's display name and value, respectively. In this case, the **Value** specifies the default parameter's value.

Passing parameter values




In this topic, you will learn how to pass parameter values to a dashboard.



Filtering

You can filter a data source or apply filtering to a specific dashboard item according to the current parameter value using the Filter Editor.

TIP For more information about filter, see Filter data via the filter editor section in the Search and find in projects topic.

In the Filter Editor, you can compare a field value with the following objects.

- **A static value** (represented by the  icon). Click this button to switch to the next item mode ("another field value"), to compare the field value with another field value.
- **Another field value** (represented by the  icon). Click this button to switch to the next item mode ("parameter value"), to compare the field value with a parameter value.
- **A parameter value** (represented by the  icon). Click this button to switch back to the initial mode ("static value"), to compare the field value with a static value.

Thus, to compare a field value with a parameter value, click the  button, then click the  button.

Calculated Fields

You can use parameters when constructing expressions for [calculated fields](#). A parameter is inserted into the expression using the "**Parameters.**" prefix.


To see a list of available parameters, click **Parameters** in the **Expression Editor** dialog.

Custom SQL Queries

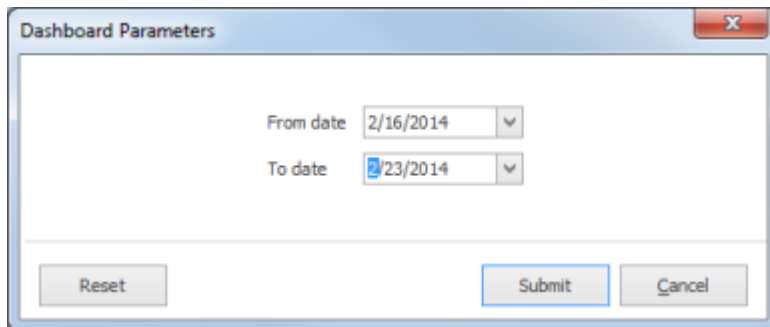
You can include parameters in a data source custom SQL query in the Query Designer. To do this, use the parameter name. For instance, you can include a parameter to a WHERE clause or to a stored procedure.

Providing a user interface for requesting parameter values

The dashboard provides a built-in **Dashboard Parameters** dialog, which provides the capability to change dashboard parameter values. This dialog is created automatically, depending on the parameter type and visibility settings.

1. To invoke the **Dashboard Parameters** dialog in the **DashboardViewer**, click the **Parameters**  button in the dashboard title. Depending on the dashboard parameters enabled, this invokes the following dialog.

This will invoke the following **Dashboard Parameters** dialog.



2. Select the required parameter values in the **Dashboard Parameters** dialog and click the **Submit** button to apply the changes.
3. To reset changes to the default values, click the **Reset** button.

Creating dashboard items

Dashboard items represent elements from the Ribbon used to visualize data within the Dashboard in various ways.

Adding dashboard items

To create a dashboard item in the Dashboard Designer, click the corresponding button in the Ribbon.



This creates an empty dashboard item and displays required data sections to bind this item to data.

TIP To learn how to bind required data, see [Binding dashboard items to data](#).

DATA ITEMS

Values

Columns

Rows

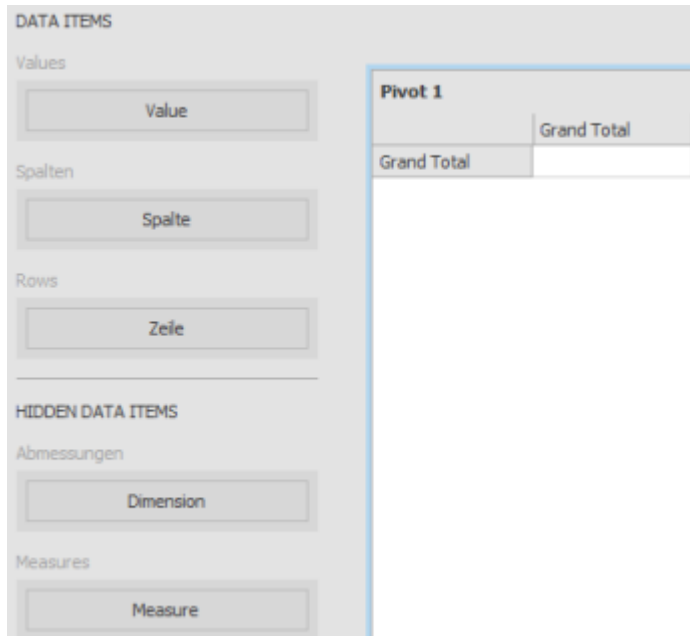
Pivot 1	
	Grand Total
Grand Total	

This section describes the available dashboard items:

Pivot

The **Pivot** dashboard item displays a cross-tabular report that presents multi-dimensional data in an easy-to-read format.

Data sections in the pivot



Values the section contains data items used to calculate values displayed in the pivot table.

Columns the section contains data items whose values are used to label columns.

Rows the section contains data items whose values are used to label rows.

Layout

If the **Columns** section or **Rows** section contains several data items, the pivot table column and row headers are arranged in a hierarchy, and make up column and row groups.

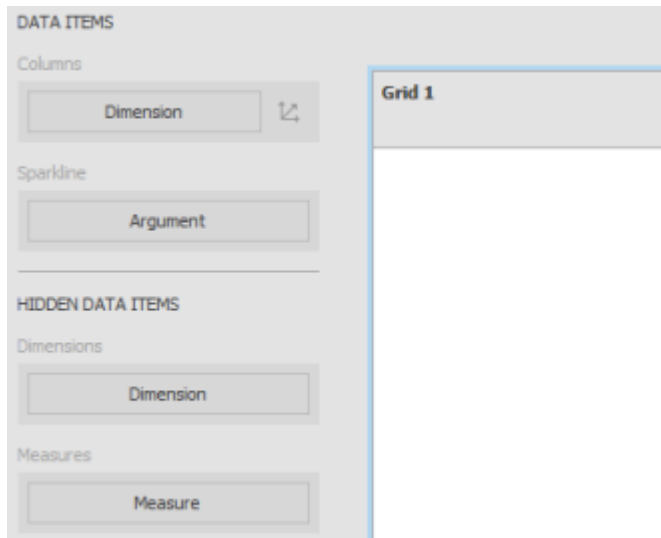
Use the **Initial State** button in the **Data** tab to open or close the groups.

This button invokes the popup menu that allows you to select whether column and row groups should be collapsed or expanded by default in a Dashboard Viewer.

Grid

This section describes the features available in the **Grid** dashboard item, and provides extensive information about data items and how to customize grids.

Data sections in the grid



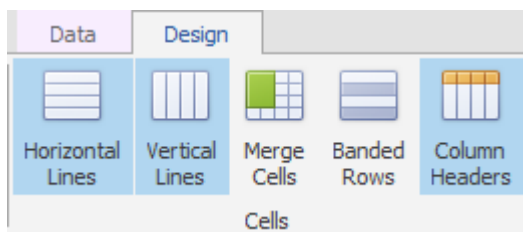
The grid has **Columns** and **Sparkline** data sections, which are used to provide data items based on the columns that are created.

Sparkline column visualizes the variation of summary values over time.

Layout

The **Grid** dashboard item allows you to introduce cell merging and banded rows, and specify the visibility of column headers and grid lines.

To do this, use the **Design** Ribbon tab.



The **Horizontal Lines** and **Vertical Lines** buttons control grid line visibility. Use the **Column Headers** button to toggle column header visibility.

You can also enable the Grid to merge adjacent cells with identical data. To do this, use the **Merge Cells** button.

To paint the background of odd and even rows differently, use the **Banded Rows** button.

NOTE Note that banded rows are not available when cell merging is enabled.

Master filtering

The **Grid** dashboard item supports filtering by rows. When Master Filtering is enabled, an end-user can click a grid row (or multiple rows by holding down the **CTRL** key) to make other dashboard items only display data related to the selected record(s).

TIP To learn how to enable Master Filtering in the Designer, see [Master filtering](#).

Drill-Down

The built-in drill-down capability allows end-users to change the detail level of data displayed in dashboard items on the fly.

TIP To learn more, see Drill-Down.

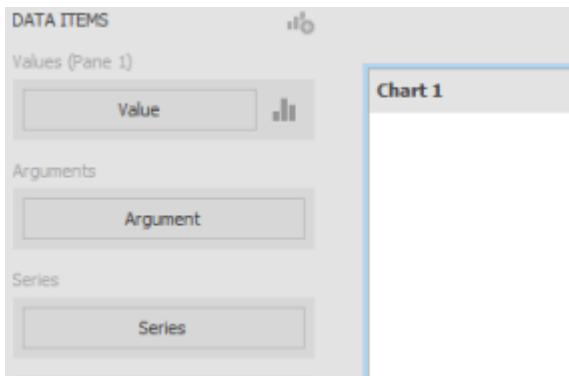
The Grid dashboard item supports drill-down for rows. When drill-down is enabled, an end-user can click a grid row to view the details.

Drill-down requires that the **Columns** section contains several dimensions at the top, from the least detailed to the most detailed dimension.

NOTE In OLAP mode, you can perform drill-down for either a hierarchy data item or several dimension attributes.

Chart

Data sections in the chart



Values the section contains data items against which the Y-coordinates of data points are calculated.

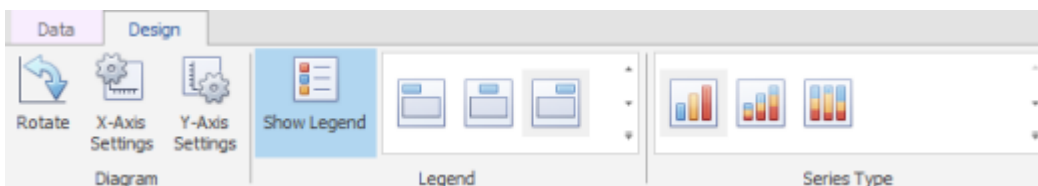
Arguments the section contains data items that provide values displayed along the X-axis of the chart.

Series the section contains data items whose values are used to create chart series.

Layout

This section describes the features available in the **Chart** dashboard item, and provide extensive information on how to customize charts.

All buttons are displayed on the **Design** tab.



- You can rotate the Chart so that the X-axis becomes vertical, and the Y-axis becomes horizontal. Use the **Rotate** button in the **Diagram** group.

- The Chart dashboard item displays two axes by default: the X-axis and the Y-axis. The X-axis is the axis of arguments. The Y-axis is the numerical axis of values.
 - Click **X-Axis Settings** to invoke the **X-Axis Settings** dialog. The setting **Show X-axis** allows you to hide and show the X-axis. The setting **Show title** allows you to hide and show the X-axis title. You can choose whether to use the default text or specify a custom string.
 - If the dimension in the Arguments section contains numeric data, the Chart can create either a continuous X-axis or a discrete X-axis. Specify the needed type in the context menu for the argument on the **Data Item** pane.
 - Click **Y-Axis Settings** to invoke the Y-Axis Settings dialog. The dialog contains the following settings:
 - **Show grid lines** Allows you to hide and show grid lines for the Y-axis.
 - **Show Y-axis** Allows you to hide and show the Y-axis.
 - **Always show zero level** Specifies whether or not the axis' zero level is visible. If this option is unchecked, the visible axis range is defined based on the values plotted in the chart.
 - **Show title** Allows you to hide and show the Y-axis title. You can choose whether to use the default text or specify a custom string.
- A **Legend** is an element of a chart that identifies its series. You can specify whether or not a chart should display a legend. In the Designer, use the **Show Legend** button in the **Legend** group.
 - To specify the legend's position and orientation, select one of the predefined options from the gallery in the **Design** Ribbon tab.
- The **Chart** dashboard item supports different types of series - from simple bar and line charts to candle stick and bubble graphs. To switch between series types in the Designer do one of the following
 - Click an options button near a required data item (or a placeholder) in the **Values** section. In the invoked **Series Type** dialog, select a required series type and click **OK**.
 - Use the **Series Type** gallery in the **Design** Ribbon tab.

Master Filtering

Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

TIP To learn more, see the [Master filtering](#) topic that describes filtering concepts common to all dashboard items.

The **Chart** dashboard item supports filtering by **argument** or **series** values.

- When filtering by arguments is enabled, an end-user can click series points to make other dashboard items display only data related to selected argument values. Click the **Arguments** button in the **Data** Ribbon tab.
- When filtering by series is enabled, an end-user can click a series point to make other dashboard items display only data related to the selected series. Click the **Series** button in the **Data** Ribbon tab.

Drill-Down

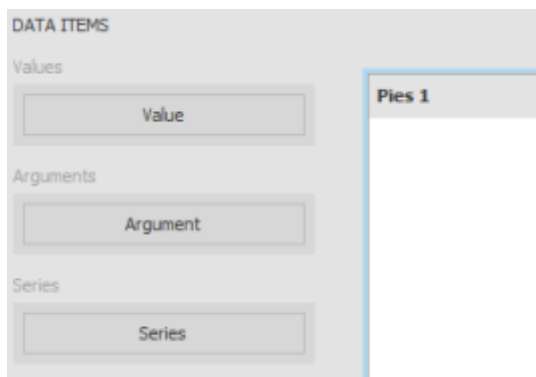
The built-in drill-down capability allows end-users to change the detail level of data displayed in dashboard items on the fly. To learn more, see [Drill-Down](#).

The Chart dashboard item supports drill-down on argument or series values.

- When drill-down on arguments is enabled, an end-user can click a series point to view a detail chart for the corresponding argument value. Drill-down on arguments requires that the Arguments section contains several data items, from the least detailed to the most detailed item. Click **Arguments** in the **Data** Ribbon tab.
- When drill-down on series is enabled, an end-user can click a series point (or corresponding legend item) to view a detail chart for the corresponding series. Drill-down on series requires that the Series section contains several data items, from the least detailed to the most detailed item. Click **Series** in the **Data** Ribbon tab.

Pies

Data sections in the pies



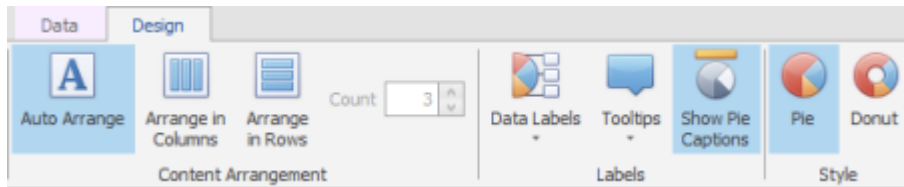
Values the section contains data items that define the share of pie segments.

Arguments the section contains data items that provide values used to label pie segments.

Series the section contains data items whose values are used to label pie charts.

Layout

All buttons for customizing the dashboard item **Pies** are on the **Design** tab.



- To control how pies are arranged, use the **Content Arrangement** group in the **Design** Ribbon tab.
 - By default, the **Auto Arrange** option is enabled, which automatically resizes pies to fit within the dashboard item.
 - You can also specify the number of columns in which pies are arranged. Click the **Arrange in Columns** button and specify the appropriate number in the **Count** field.
 - Similarly, you can arrange pies in a specific number of rows.
- Pies display **data labels** that contain descriptions for pie segments, and provide **tooltips** with additional information.
 - You can specify which information should be displayed within data labels and tooltips. To do this, use the **Data Labels** and **Tooltips** buttons in the **Design** Ribbon tab. These buttons invoke the drop-down menu, which is similar for both buttons. This menu allows you to specify which values are displayed within data labels or tooltips.
 - Define the visibility of the pie caption via the Show Pie Captions button.
- Select the diagram style, use the **Pie** and **Donut** buttons in the **Style** group of the **Design** Ribbon tab.

Master Filtering

Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

TIP To learn more, see the [Master filtering](#) topic that describes filtering concepts common to all dashboard items.

The **Pie** dashboard item supports filtering by **argument** or **series** values.

- When filtering by arguments is enabled, an end-user can click a pie segment to make other dashboard items display only data related to selected argument values. Click the **Arguments** button in the **Data** Ribbon tab.
- When filtering by series is enabled, an end-user can click a pie to make other dashboard items display only data related to the selected pie. Click the **Series** button in the **Data** Ribbon tab.

Drill-Down

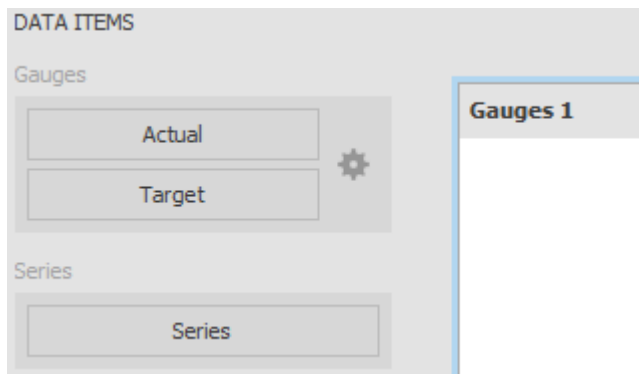
The built-in drill-down capability allows end-users to change the detail level of data displayed in dashboard items on the fly. To learn more, see [Drill-Down](#).

The **Pie** dashboard item supports drill-down on **argument** or **series** values.

- When drill-down on arguments is enabled, an end-user can click a pie segment to view a detail chart for the corresponding argument value. Drill-down on arguments requires that the Arguments section contains several data items, from the least detailed to the most detailed item. Click **Arguments** in the **Data** Ribbon tab.
- When drill-down on series is enabled, an end-user can click a pie to view a detail chart for the corresponding series. Drill-down on series requires that the Series section contains several data items, from the least detailed to the most detailed item. Click **Series** in the **Data** Ribbon tab.

Gauges

Data sections in the gauges



Gauges the section contains data items used to calculate values displayed by gauges.

Data items are arranged in containers. Each **data item container** can hold two data items. The first item contains *actual* data and the second item (optional) contains *target* data. If both items are provided, gauges show the difference between actual and target values.

Series the section contains data items whose values are used to label gauges.

Layout

All buttons for customizing are on the Design tab.

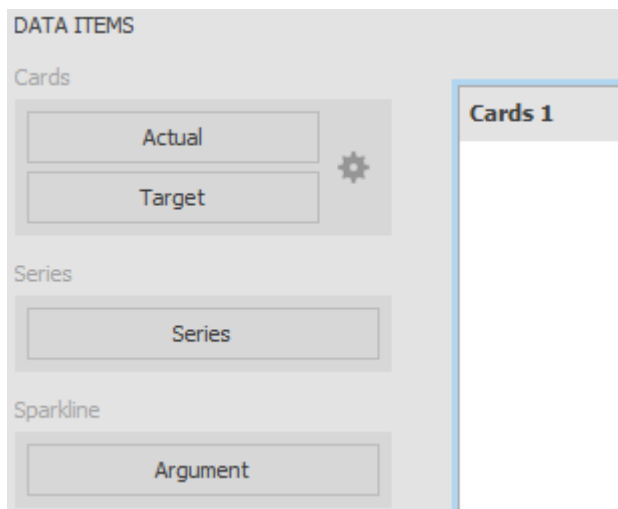


- To control how gauges are arranged, use the **Content Arrangement** group in the **Design** Ribbon tab.
 - By default, the **Auto Arrange** option is enabled, which automatically resizes gauges to fit within the dashboard item.

- You can also specify the number of columns in which gauges are arranged. Click the **Arrange in Columns** button and specify the appropriate number in the **Count** field.
- Similarly, you can arrange gauges in a specific number of rows.
- The Gauge dashboard item allows you to select the gauge type: **Full Circular**, **Half-Circular**, **Left-Quarter Circular**, **Right-Quarter Circular**, **Three-Fourths Circular**, **Linear Horizontal** and **Linear Vertical**.

Cards

Data sections in the cards



Cards the section contains data items used to calculate values displayed within cards.

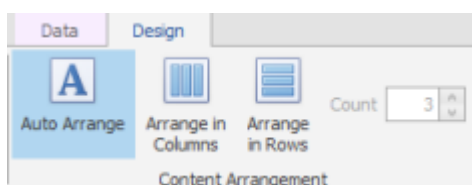
Data items are arranged in containers. Each **data item container** can hold two data items. The first item contains *actual* data and the second item (optional) contains *target* data. If both items are provided, cards show the difference between actual and target values.

Series the section contains data items whose values are used to label cards.

Sparkline the section is used to provide a date-time dimension whose data will be used to visualize values using sparklines.

Layout

To control how cards are arranged, use the **Content Arrangement** group in the **Design** Ribbon tab.

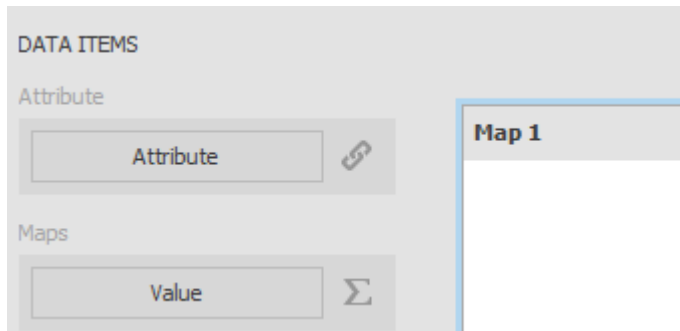


- By default, the **Auto Arrange** option is enabled, which automatically resizes cards to fit within the dashboard item.

- You can also specify the number of columns in which cards are arranged. Click the **Arrange in Columns** button and specify the appropriate number in the **Count** field.
- Similarly, you can arrange cards in a specific number of rows.

Choropleth map

Data sections in the Choropleth Map

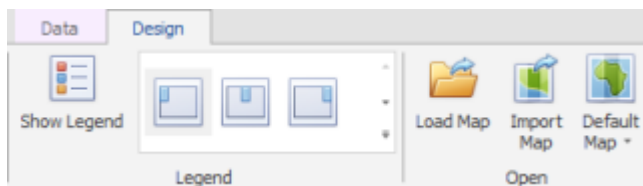


Attribute the data section contains the **Attribute** data item, which allows you to associate map shapes with data source field values.

Maps data section contains data items whose values are used to color map shapes. Map shape colors vary based on the map type.

Layout

Alle buttons for customizing the dashboard item are on the Design tab.



A **Legend** is an element of a chart that identifies its series. You can specify whether or not a chart should display a legend. In the Designer, use the **Show Legend** button in the **Legend** group.

To specify the legend's position and orientation, select one of the predefined options from the gallery in the **Design** Ribbon tab.

Providing maps

Dashboard ships with a set of default maps showing various parts of the world. The following maps are included.

- **World Countries** - a world map.
- **Europe** - a map of Europe.
- **Asia** - a map of Asia.
- **North America** - a map of North America.

- **South America** - a map of South America.
- **Africa** - a map of Africa.
- **USA** - a map of the USA.
- **Canada** - a map of Canada.

As an alternative, use the corresponding command in the map context menu.

Dashboard uses a **Shapefile** vector format to provide custom maps. Commonly, this format includes two file types. To open an existing shapefile, use the **Load Map** or **Import Map** button in the Ribbon. In the invoked dialog, locate the required **.shp** file.

Map attributes

After you select the default map or a custom map, you can view supplemental information (such as the name of the country, state, etc.). To do this, click the **Options** button next to the **Attribute** data item.

In the invoked **Map Attribute Binding** dialog, click **Preview**. The table in the dialog displays the available attributes for the current map. Each set of attribute values is related to a specific map shape.

Map coloring

The **Choropleth Map** dashboard item colors map shapes depending on the provided values.

The **Choropleth Map** automatically selects palette and scale settings to color map shapes.

If you need to customize these settings, click the **Options** button next to the data item that contains these values. This invokes the **Choropleth Map Options** dialog.

You can specify the following settings in this window.

- **Color palette** - allows you to specify the start and end color of the palette.
- **Scale settings** - specifies whether a *percent* scale or an *absolute* scale is used to define a set of colors. You can specify the number of levels that represent the number of colors used to color the map.
- **Preview** is used to display a full set of palette colors generated based on the start/end colors and the number of levels. Use the **Allow Edit** check box to automatically change the generated colors or specify value ranges for each color.

Delta

The **Choropleth Map** allows you to indicate the difference between the actual and target values of a particular parameter. This difference is called **delta**.

To specify delta indication settings, click the **Options** button next to the data item container.

This invokes the **Choropleth Map Options** dialog. When the map type is set to **Delta**, this dialog contains the following settings.

- **Value type** You can specify which values to display within map tooltips. Use the Value type combo box to select the value that will be displayed as the delta value.
- **Result Indication** You can specify the condition that will be used to select the indicator color. To do this, use the Result indication combo box.
- **Threshold type and Threshold value** You can specify that a required indicator should only be displayed when the difference between the actual and target values exceeds a specified value.

Master Filtering

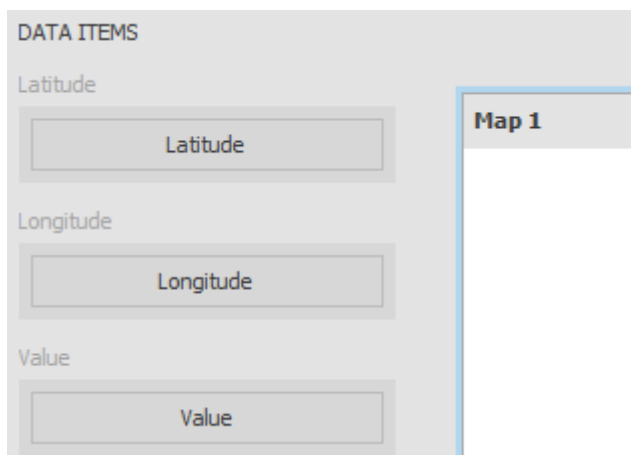
Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

TIP To learn more, see the [Master filtering](#) topic that describes filtering concepts common to all dashboard items.

When filtering is enabled, an end-user can click a shape (or multiple shapes by holding down the **CTRL** key) to make other dashboard items display only data related to selected shape(s).

Geo point map

Data sections in the Geo Point Map



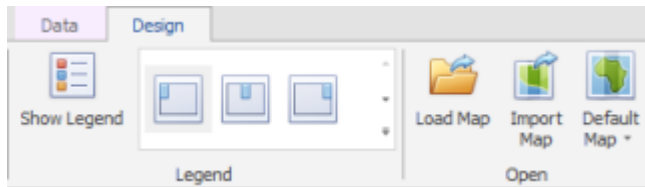
Latitude the data section accepts geographic latitude points.

Longitude the data section accepts geographic longitude points.

Value the data section accepts values related to geographic points.

Layout

Alle buttons for customizing the dashboard item are on the Design tab.



Dashboard ships with a set of default maps showing various parts of the world. The following maps are included.

- **World Countries** - a world map.
- **Europe** - a map of Europe.
- **Asia** - a map of Asia.
- **North America** - a map of North America.
- **South America** - a map of South America.
- **Africa** - a map of Africa.
- **USA** - a map of the USA.
- **Canada** - a map of Canada.

Dashboard uses a **Shapefile** vector format to provide custom maps. Commonly, this format includes two file types. To open an existing shapefile, use the **Load Map** or **Import Map** button in the Ribbon. In the invoked dialog, locate the required **.shp** file.

Master Filtering

Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

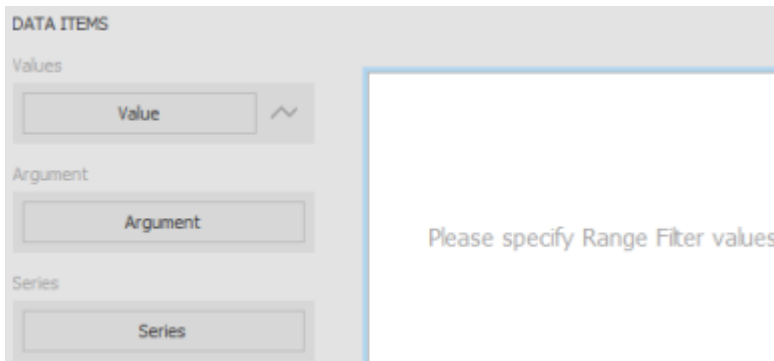
TIP To learn more, see the [Master filtering](#) topic that describes filtering concepts common to all dashboard items.

When filtering is enabled, an end-user can click a callout (or multiple a callouts by holding down the **CTRL** key) to make other dashboard items display only data related to selected a callout(s).

Range filter

The **Range Filter** dashboard item allows you to apply filtering to other dashboard items. This item displays a chart with selection thumbs that allow you to filter out values displayed along the argument axis.

Data sections in the Range Filter



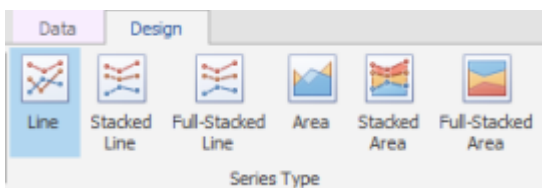
Values the section contains data items against which the Y-coordinates of data points are calculated.

Arguments the section contains data items that provide values displayed along the horizontal axis of the Range Filter. Filtering is performed based on these values.

Series the section contains data items whose values are used to create chart series.

Layout

The Range Filter dashboard item supports various Line and Area series types.



To switch between series types in the Designer do one of the following.

- Use the **Series Type** group in the **Design** Ribbon tab.
- Click the options button next to the required data item in the **Values** section. In the invoked **Series Type** dialog, select the required series type and click **OK**.

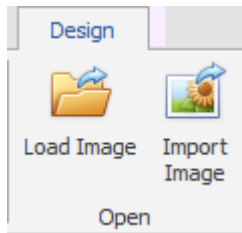
The **Range Filter** supports the following series types: **Line**, **Stacked Line**, **Full-Stacked Line**, **Area**, **Stacked Area** and **Full-Stacked Area**.

Image

Use the **Image** dashboard item to add static images to a dashboard.

Loading an image

To load an image into a dashboard item, use the **Load Image** and **Import Image** buttons in the Ribbon. or commands in the context menu (**Load Image...** and **Import Image...**, respectively).



These commands invoke the **Open** dialog, which allows you to locate the desired image.

The **Load Image** command saves the path to the image in the dashboard definition, while the **Import Image** command saves the image itself.

Image alignment

To specify how the image is aligned within the dashboard item, use the **Alignment** group in the Ribbon's **Design** tab.

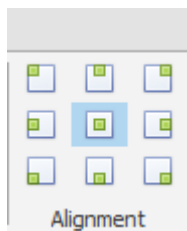
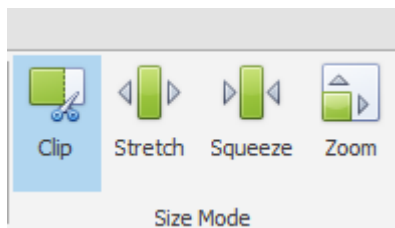


Image size mode

You can specify the image size mode that defines how the image fits within the dashboard item.

To do this, use the **Size Mode** group in the Ribbon's **Design** tab.



The following table illustrates each size mode in two cases: when the image is smaller than the dashboard item, and vice versa.

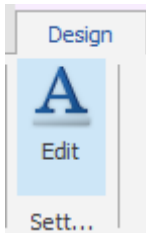
Clip	The image is clipped if it is larger than the image dashboard item.
Stretch	The image within the image dashboard item is stretched or shrunk to fit the size of the image dashboard item.
Squeeze	If the dimensions of the image dashboard item exceed those of the image it contains, the image is shown full-size. Otherwise, the image is resized to fit the dimensions of the image dashboard item.

Zoom The image is sized proportionally (without clipping), so that it best fits the image dashboard item. If the aspect ratio of the image dashboard item is the same as the aspect ratio of the image, it will be resized to fit into the image dashboard item while maintaining its aspect ratio. Otherwise, the closest fitting side of the image (either the height or the width) will be sized to fit the dashboard item, and the remaining side (height or width) will be sized proportionally (leaving empty space).

Text box

Use the **Text Box** dashboard item to display rich text within a dashboard.

Editing text



To edit text within the text box, click the **Edit** button in the Ribbon's **Design** tab, the corresponding item in the context menu, or double-click the Text Box dashboard item.

dashboard item to display rich text within a dashboard.

This invokes the **Edit Text** window in which you can edit the text content and customize its formatting.

TIP InLoox PM provides you with a range of formatting features. For the detailed description, see Create and change comments in the Customize comments section.

Binding dashboard items to data

Dashboard items must be bound to data source fields to display data.

Each kind of dashboard item has a specific set of **data sections** such as **Values, Arguments** and **Series** in the chart, **Columns** in the grid, and **Values, Columns** and **Rows** in the pivot grid. Each data section corresponds to a particular dashboard item area or element, and should be mapped to data to be displayed within this area/element.

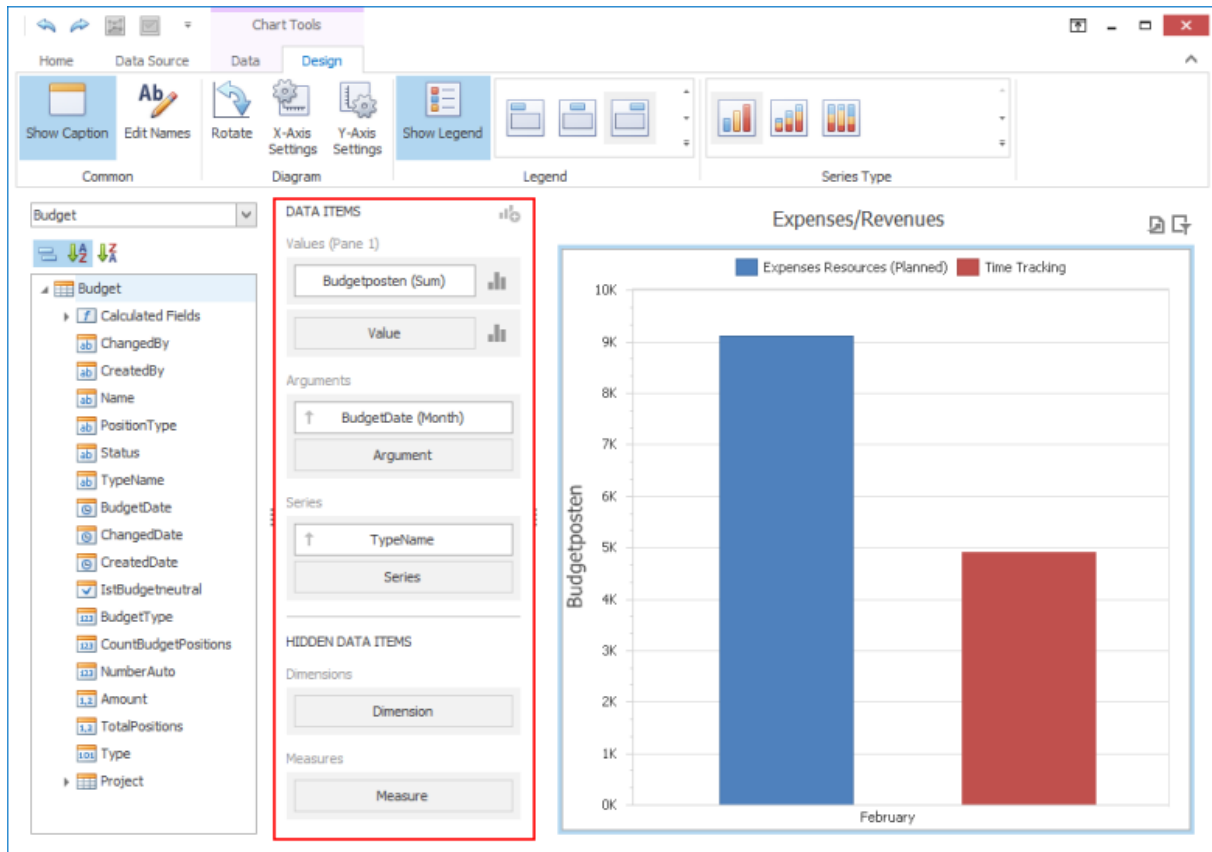
Mapping is performed using special objects called **data items**. A data item identifies data binding. When created, a data item is mapped to a data source field, and is then assigned to a specific dashboard item's data section. As a result, the dashboard item is bound to the data source field.

TIP Learn more about data items in the data sections, see Creating dashboard items.

This section consists of the following topics.

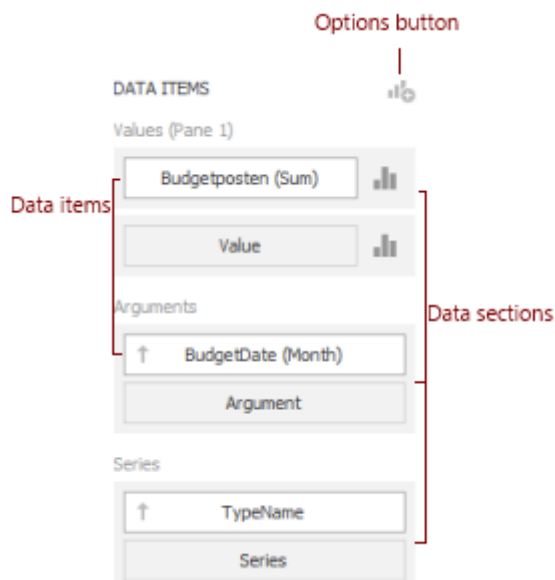
Binding dashboard items to data in the designer

To bind dashboard items to data in the Dashboard Designer, use the **Data Items** pane.

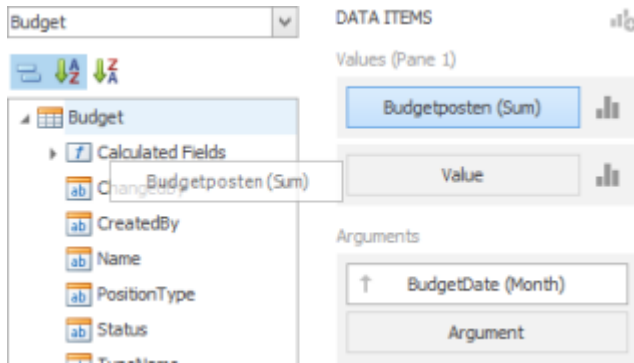


This pane displays data sections of the selected dashboard item and can be used to add, rearrange and remove data items.

Specific data sections display **options buttons** for each data item. Use these buttons to invoke a dialog that allows you to customize the settings of this data item.

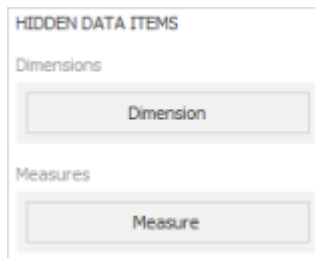


To bind a dashboard item to data, select the dashboard item. Then choose the required data member from the **Data Source Browser** and drop it onto the appropriate section in the DATA ITEMS pane.



Hidden data items

The **Hidden data items** area was designed to perform [data shaping](#) operations by measures or dimensions that do not directly take part in the visual representation of data.



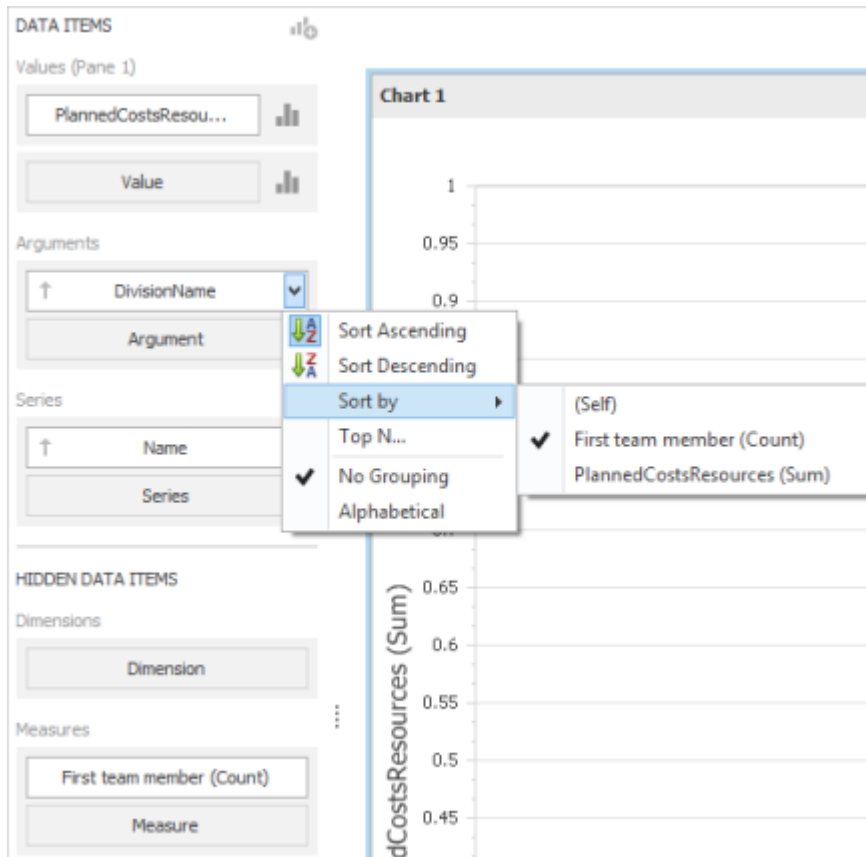
The **Dimension** class represents a data item whose values are not intended to be summarized. The dashboard would not summarize the dimension values but process each one individually. This means that dimension values are eligible for sorting or grouping.

The **Measure** class represents a data item whose values are summarized before they are used in the dashboard. The dashboard will calculate an appropriate summary function against measure values. For instance, measures are used to provide data for the chart's Y-axis.

Assume that you have a dashboard containing a chart that shows the planned resource costs in a company by department.

Now imagine that you need to sort departments by the team members. To do this, you will need to add the **First team member** measure to the Chart so that its data is not displayed, but only used for sorting.

Drag-and-drop the **First team member** data field onto the **Measures** section in the **Hidden data items** area. This will create the **First team member (Count)** measure, which will be available in the **Sort by** menu.



Note that the Hidden data items area is divided into two sections: **Dimensions** and **Measures**.

TIPS

- Hidden dimensions appear in the **Filter Editor** dialog, allowing you to create filter criteria based on their values. For more information see [Filtering](#).
- Hidden measures appear in the **Sort by** submenu (to [sort dimension values](#) by them), and in the **Top N Values** dialog (to use them in [Top N conditions](#)).

Binding dashboard items to data in OLAP mode

In OLAP mode, the cube schema is fetched automatically, and the **Data Source Browser** displays the entire OLAP cube structure.

To visualize data, drag-and-drop measures, attributes or hierarchies to the appropriate data sections in the **DATA ITEMS** area, as described in the Binding dashboard items to data in the designer topic.

Note that OLAP measures can only be placed in the **Values** section, while dimension attributes and hierarchies can be placed within other data sections.

OLAP hierarchies allow you to customize each of their levels separately. To access hierarchy level options, invoke the data item menu for the hierarchy and then use the submenu that corresponds to the desired level.

TIP

To learn about the limitations of binding to an OLAP cube, see the Providing data in the dashboard designer topic.

Data shaping

This section describes how to perform various data shaping operations (such as grouping, sorting and filtering) in the Dashboard Designer.

The section contains the following topics.

Summarization

To obtain numeric values that should be displayed within a dashboard item, Dashboard calculates a summary function against the specified measure.

This topic describes how to specify which summary function should be calculated against a particular measure.

Summary function types

The following summary functions are available.

Count The number of values (excluding **Null** and **DBNull** values).
This is the only summary type that can be calculated against non-numeric data.

Sum The sum of the values.

$$Sum = \sum_i v_i$$

Min The smallest value.

Max The largest value.

Average The average of the values.

$$\bar{v} = \frac{1}{n} \cdot \sum_i v_i$$

StdDev An estimate of the standard deviation of a population, where the sample is a subset of the entire population.

$$StdDev = \sqrt{\frac{1}{n-1} \cdot \sum_i (v_i - \bar{v})^2}$$

StdDevP The standard deviation of a population, where the population is the entire data to be summarized.

$$StdDevp = \sqrt{\frac{1}{n} \cdot \sum_i (v_i - \bar{v})^2}$$

Var An estimate of the variance of a population, where the sample is a subset of the entire population.

$$Var = \frac{1}{n-1} \cdot \sum_i (v_i - \bar{v})^2$$

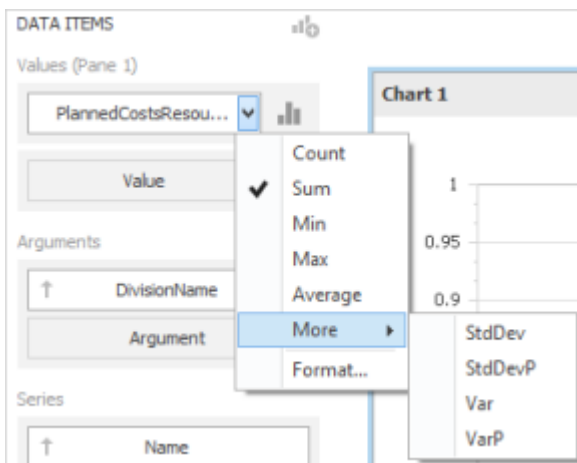
VarP The variance of a population, where the population is the entire data to be summarized.

$$Varp = \frac{1}{n} \cdot \sum_i (v_i - \bar{v})^2$$

Changing summary type

By default, Dashboard calculates **Sum** for numeric measures and **Count** for measures that contain another type of data.

You can change the summary function type for numeric measures. To do this in the Designer, invoke the data item menu and select the desired summary type. Less common summary types are organized in the **More** submenu.



Grouping

Dashboard allows you to group dimension values and display summaries for entire groups rather than individual values.

You can arrange dimension values in groups of different sizes by specifying the appropriate **group interval**. For instance, date-time values can be grouped by years, months, quarters, etc.

This topic lists the supported text and date-time group intervals, and describes how to change the group interval.

The following sections are available.

Text group intervals

String values support the following grouping intervals.

No grouping	Each value is displayed "as is".
Alphabetical	Values are grouped alphabetically. Example: A, B, C, ... Z

Date-time group intervals

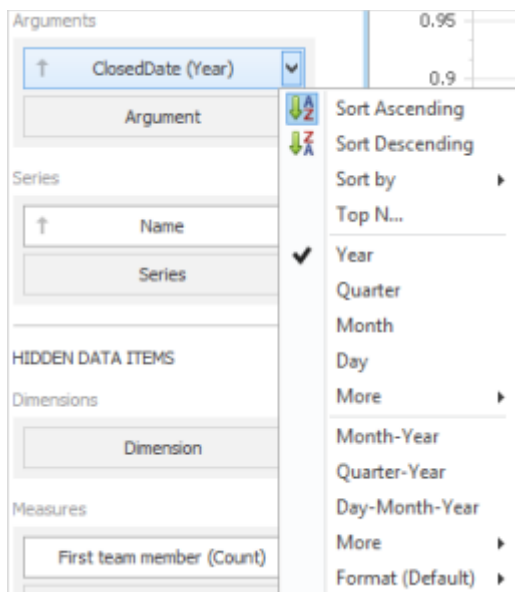
Date-time values support the following group intervals.

Year	Values are grouped by the year. Example: 2012, 2013, 2014
Quarter	Values are grouped by the quarter. Example: Q1, Q2, Q3, Q4
Month	Values are grouped by the month. Example: January, February, March, ... December
Day	Values are grouped by the day of the month. Example: 1, 2, 3, ... 31
Hour	Values are grouped by the hour. Example: 0, 1, 2, ... 23
Minute	Values are grouped by the minute. Example: 0, 1, 2, ... 59
Second	Values are grouped by the second. Example: 0, 1, 2, ... 59
Day of the Year	Values are grouped by the day of the year. Example: 1, 2, 3, ... 365 (366 in a leap year)
Day of the Week	Values are grouped by the day of the week. Example: Sunday, Monday, Tuesday, ... Saturday
Week of the Month	Values are grouped by the week of the month. Example: 1, 2, 3, 4, 5
Month-Year	Values are grouped by the year and month. Example: January 2012, February 2012, ... December 2012, January 2013, ...
Quarter-Year	Values are grouped by the year and quarter. Example: Q3 2013, Q4 2013, Q1 2014, Q2 2014, ...

Day-Month-Year	Values are grouped by date. Example: 3/4/2014, 3/5/2014, 3/6/2014, ...
Date-Hour	Values are grouped by date with the hour value. Example: 3/4/2014 0:00 AM, 3/4/2014 1:00 AM, 3/4/2014 2:00 AM, ...
Date-Hour-Minute	Values are grouped by date with the hour and minute values. Example: 3/4/2014 0:00 AM, 3/4/2014 0:01 AM, 3/4/2014 0:02 AM, ...
Date-Hour-Minute-Second	Values are grouped by date with the hour, minute and second values. Example: 3/4/2014 0:00:00 AM, 3/4/2014 0:00:01 AM, 3/4/2014 0:00:02 AM, ...

Changing group interval

To specify the group interval in the Designer, invoke the data item menu and select the desired group interval. Less common group intervals are organized in the **More** submenus.

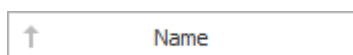


Sorting

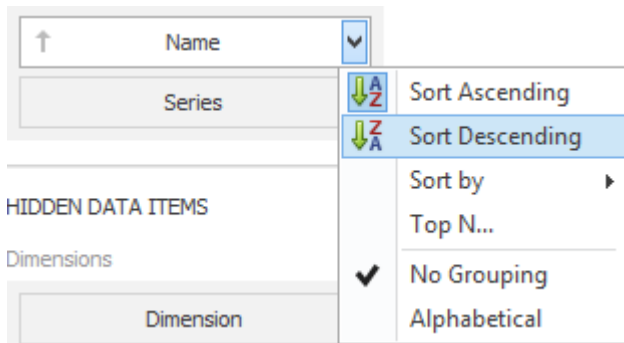
The Dashboard allows you to easily change the sort order of values within a dashboard item. You can also enable sorting by parameter values.

Changing Sort Order

The sort order of dimension values is indicated with an arrow.



To change the sort order in the Designer, click the data item. You can also toggle sorting from the data item menu.



Sorting by Parameter Values

Dashboard allows you to sort dimension values by a specific parameter represented by a measure. To enable sorting by measure in the Designer, use the **Sort by** submenu in the dimension's menu.

TIP You can also sort dimension values by values of hidden measures, see Hidden data items.

Filtering

Dashboard allows you to apply filtering to each individual data-aware dashboard item.

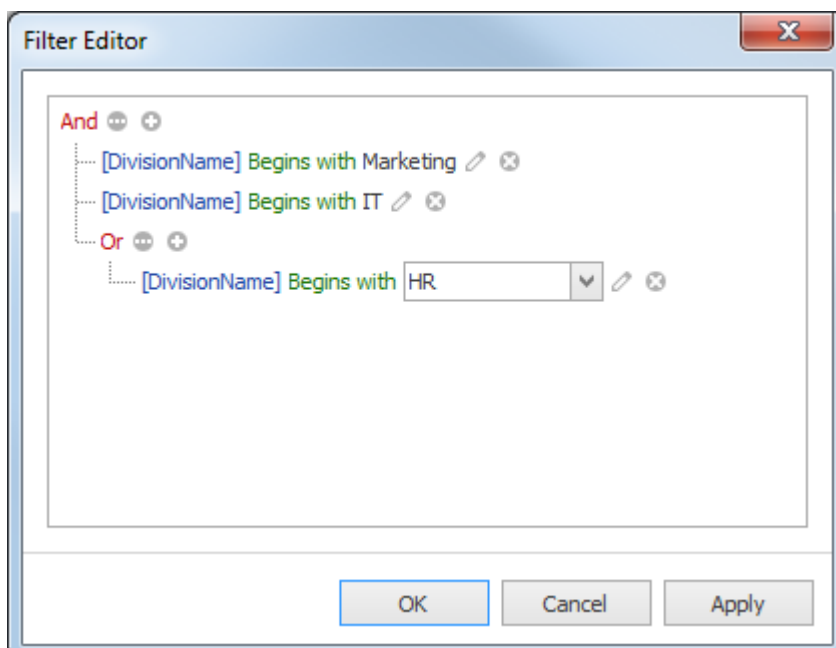
This topic describes how to enable and reset filtering.

Apply filtering

To configure filtering in the Designer, select the target dashboard item and do one of the following.

- Click the **Edit Filter** button in the **Data** tab.
- Right-click on a dashboard item and select **Edit Filter** from its context menu.

This will invoke the **Filter Editor** dialog. Use this dialog to build filter criteria with a convenient tree-like interface.



TIPS

- You can use hidden dimensions within the Filter Editor dialog, allowing you to filter data based on their values. For more information see Hidden data items.
- To learn how to work with the Filter Editor, see Search and find projects, in the Use filters section.

Clear filtering

To clear filtering in the Designer, select the target dashboard item and do one of the following.

- Click the **Clear** button in the **Data** tab.
- Right-click on a dashboard item and select **Clear** from its context menu.

OLAP filtering specifics

You cannot apply filtering by building complex filter criteria in OLAP mode. Instead, you can filter dimension attributes and hierarchies by manually selecting the values you wish (or do not wish) to include in the dashboard.

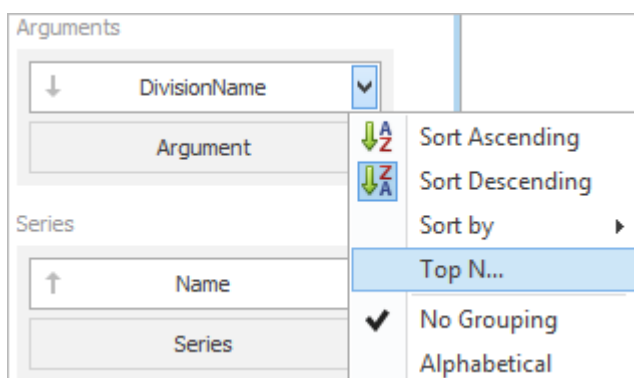
For dimension attributes, the Filter Editor contains a list of all values. You can select the values that you wish to display.

For hierarchies, a tree is displayed instead, allowing you to filter individual values at any hierarchy level.

Top N

The **Top N** feature allows you to display only a limited number of values that correspond to the highest or lowest values of a particular parameter.

1. To display the top values in a dimension, select **Top N** from the data item menu.



2. In the Top N Values dialog, check the **Enabled** check box and specify the following settings.

Mode Specifies whether top or bottom values should be displayed.

Count	The number of values to be displayed.
Measure	The parameter according to which the top or bottom values will be determined.
Show "Others" value	If enabled, all values that are not the top/bottom ones are consolidated in the "Others" value.

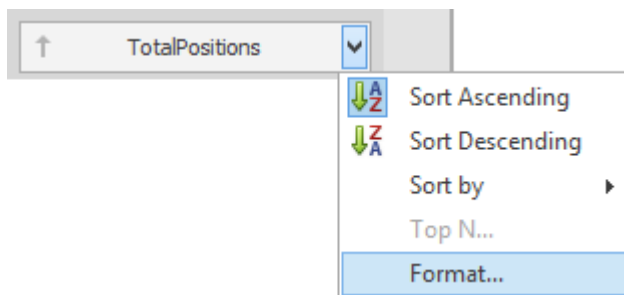
TIP You can use the hidden measure as a parameter according to which the top or bottom values will be determined. See Hidden data items.

Formatting data

Dashboard allows you to customize various data format settings for numeric and date-time values.

Formatting numeric values

1. To specify a format for numeric values, select **Format** in the data item menu.



This invokes the **Numeric Format** window.

2. In the **Format type** field, select the required format type.
3. Other format settings are only in effect for specific format types.
 1. **Unit** The unit to which values should be converted.
 2. **Precision** The number of fractional digits that should be displayed.
 3. **Currency** Defines the currency sign and format settings that should be used to display currency values.
To learn about currency formatting specifics, see the Currency formatting specifics section below of this document.
 4. **Currency culture** For currencies used in a region with several cultures, specifies the culture that defines format settings.
 5. **Include group separator** Specifies whether or not separators should be inserted between digit groups.

Formatting date-time values

To specify a format for date-time values, use the **Format** submenu in the data item menu. This submenu lists the available format types that depend on the selected group interval.

TIP For details on group intervals, see the Grouping topic.

Currency formatting specifics

The Dashboard allows you to specify currency format at two levels: for individual data items and for the entire dashboard.

1. Data Item Currency

- To specify which currency to use for a particular data item, select **Format** from the data item menu.
- In the **Numeric Format** dialog, select *Currency* in the **Format type** field and use the **Currency** combo box to select the required currency.
- For regions with several cultures, you can also select the culture that will be used to format currency values.
- You can also apply the default dashboard currency by selecting *Use dashboard settings* in the **Currency** field.

2. Dashboard Currency

You can also specify the default currency for the dashboard. This setting will be applied to dashboard items that have no currency defined.

- To set the dashboard currency, click the **Currency** button in the Ribbon.
- This invokes the **Dashboard Currency** window. In this window, select the required currency using the **Currency** combo box.
- For regions with several cultures, you can also select the culture that will be used to format currency values.
- You can also specify the client culture that should be used for the dashboard by selecting the *Use client system settings* item.

Interactivity

This section describes features that enable interaction between various dashboard items. These features include Master Filtering and Drill-Down.

The section consists of the following topics.

Master filtering

The **Dashboard** allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**). End-users can select elements in a **Master Filter** item (chart bars, pie segments, grid records, etc.) to filter data in the rest of the dashboard by the selected values.

Master filtering modes

The Master Filter item supports two selection modes.

- **Multiple** Allows you to select multiple elements in the Master Filter item. To enable this mode, use the Multiple Master Filter button in the Data tab.
To clear the selection in the Master Filter item, use the **Clear Master Filter** button in the dashboard item caption.
- **Single** Allows you to select only one element in the Master Filter item. When this mode is enabled, the default selection will be set to a Master Filter element. You can change this selection, but cannot clear it. To enable this mode, use the **Single Master Filter** button in the **Data** Ribbon tab.


Filtering across data sources

When different items in a dashboard are bound to different data sources, you can specify that a particular Master Filter should be applied across data sources. This means that it will apply filtering to fields with matching names in all data sources.

NOTE Fields are matched by their full names. For fields in other data sources to be affected by Master Filtering, their names must match the name of the field in the current data source, and they must belong to the same hierarchy level so that their full names also match. For instance, Customer.City and Customer.Address.City will not be treated as matching fields.

To enable filtering across data sources, use the **Cross-Data-Source Filtering** button in the **Data** tab.

Preventing items from being filtered


You can prevent specific dashboard items from being affected by Master Filters, so that Master Filtering will never be applied to them. To do this, use the **Ignore Master Filters** button  in the **Data** tab.

Drill-down

Dashboard provides the **drill-down** feature, which allows end-users to change the detail level of data displayed in a dashboard item. This feature enables users to drill down to display the details, or drill up to view more general information.

To enable drill-down, use the **Drill-Down** button in the **Data** tab.

NOTE If the selected dashboard item contains several types of elements that can be used for drill-down, the Ribbon will provide the appropriate buttons to switch between these types (e.g., **Arguments** and **Series** buttons for the Chart).

To return to the previous detail level (drill up), use the **Drill Up** button  in the dashboard item's caption or in the context menu.

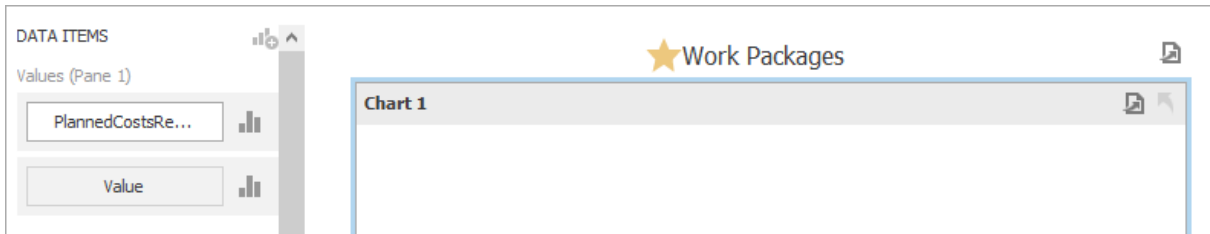
Dashboard layout

This section describes the features related to the dashboard layout.

The section consists of the following topics.

Dashboard title

The **Dashboard Title** is located in the **Dashboard Title Area**, which is displayed at the top of the Dashboard. The dashboard title can contain text or image content.



1. To change the title settings click the **Title** button on the **Home** tab.
2. This invokes the **Dashboard Title** dialog, which allows you to change the text within the dashboard title, add an image, etc.

NOTE If you add an image to the dashboard title using the **Load** button, the dashboard XML file will contain the URL to access the image. If you add the image using the **Import** button, the dashboard XML file will contain an image as a byte array.

TIPS The dashboard title area can contain command buttons.

- **Print** button allows end-users to print/export the dashboard.
- **Parameters** button allows end-users to modify dashboard parameter values. To learn more about parameters, see the Using dashboard parameters topic.

Dashboard items layout


The **Dashboard Designer** provides the capability to arrange and resize dashboard items in various ways, using simple drag-and-drop operations. You can also arrange and resize dashboard items using an API provided by the Dashboard.

Item Resizing: You can resize individual items within a specific layout group (or an entire group) by dragging their edges.

Item Positioning: You can change the position of a dashboard item via drag-and-drop, using one of the following approaches.

- If the caption of the dashboard item is visible, click it and hold down the left mouse button while dragging the item.



- If the caption of the dashboard item is not visible, click the  icon in the top left corner, and hold down the left mouse button while dragging the item.

Depending on the required dashboard item position, a new layout group is created (if required) to maintain the arrangement of items. Thus, the dashboard item can be inserted to the desired area of a new or existing dashboard layout group.

The drag-and-drop indicator shows possible positions for the dashboard item...

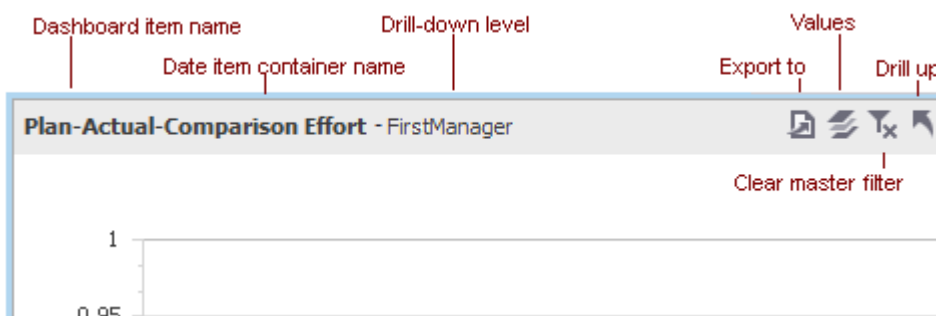


...and sequentially displays areas that can be occupied by the dashboard item. The image below illustrates how a dashboard item is dragged.

NOTE You cannot move the layout group to a position within its own subtree.

Dashboard item caption

Each dashboard item has a caption that is displayed at the top of this item. The caption contains static text along with other information, as well as command buttons.



- To show or hide the caption of a dashboard item, click the **Show Caption** button in the **Design** tab.
- Or right-click the item when designing the dashboard, and click the **Show Caption** menu item.

The caption of the Dashboard item contains the following information and buttons, depending on the dashboard item type.

Names

- **Dashboard Item Name** - represents the static text within a dashboard item's caption.
- **Data Item Container Name** - represents the name of the **data item container**. To learn more about data item containers, see the **Data Sections** topic for the corresponding dashboard item.

You can change default names using the **Edit Names** dialog. To invoke this dialog, right-click the item when designing the dashboard, and click the **Edit Names...** menu item.

Interactivity Information

- **Drill-Down Level** - shows the current detail level of data displayed in a dashboard item.

TIP To learn more, see the Drill-down topic.

Command Buttons

- **Export to** button - allows you to print or export a dashboard item. To learn how to print individual dashboard items, see Print the project list.
- **Values** button - invokes a drop-down menu that allows you to switch between provided values (in the pie, card, gauge and maps dashboard

items). To learn more, see the Data Sections topic in the **Providing Data** section for the corresponding dashboard item.

- **Clear Master Filter** button - allows you to reset filtering when a dashboard item acts as the **Master Filter**. To learn more, see the Master Filtering topic in the Interactivity section for the corresponding dashboard item.
- **Drill Up** button - allows you to return to the previous detail level when the drill-down capability is enabled for this item. To learn more, see the Drill-Down topic in the Interactivity section for the corresponding dashboard item.

Documents

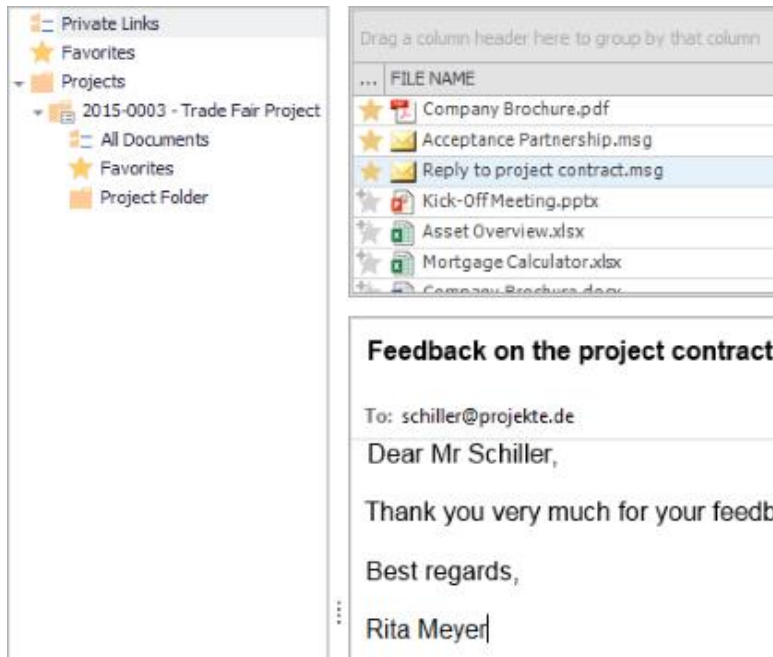
Organize personal and project-independent documents

With InLoox you can sort project-independent documents into folders – directly in InLoox. You can also add personal documents and manage them together with your project and department documents all in one place. You don't even need to open a specific project.

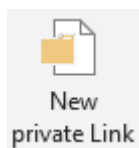
The project-independent document section offers the same features as the document section in the different projects. For more information on the features in the document section please see the Organize project-related documents chapter.

How to organize project-independent documents:

1. Click on **Documents** in the **InLoox PM** or **InLoox now** tab.
2. The Documents area opens. Here you'll find a folder tree structure on the left. There, click on **Private Links**.
 - You can store all your personal and project-independent documents in the **Private Links** folder.
 - Additionally, the tree structure allows you to access all documents of your projects. Therefore click on the project folder in the tree structure.

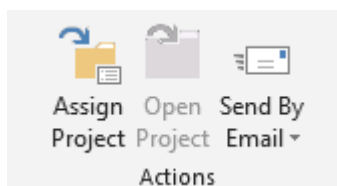


3. Now click on **New Private Link** in the **Start** tab, to create a new link to a personal document.



4. Now select the regarding document from your computer or your file server. The document is now linked to InLoox PM without having to have a relation to an InLoox project. Other InLoox users cannot access the document. If you use InLoox for Outlook in combination with InLoox now! you can also upload documents. Just follow the same steps as if you were to create a personal link in InLoox PM.

5. If you want to assign the document to a project later on, please select a document from the document list and click on **Assign Project** on the **Start** tab.



Organize project-related documents

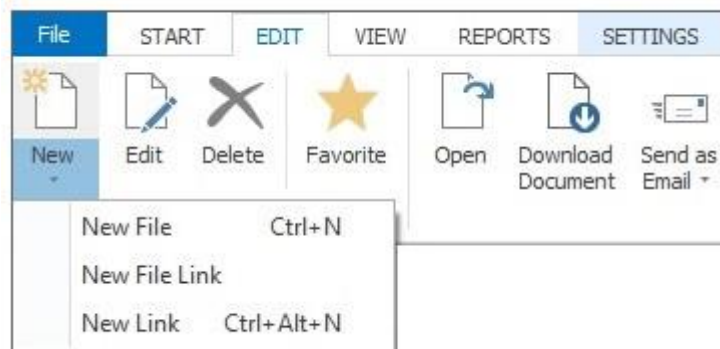
Add and edit project documents

Work with file links to save storage space and avoid duplicates. File links don't occupy storage space, as documents aren't saved directly in Microsoft Outlook or on the Exchange Server.

Please note: The access permissions of the original document still exist in InLoox equally whether you upload the document or you work with file links. If you add a file from a protected network folder or SharePoint store to the InLoox storage, still only authorized users can read and update it. Therefore always take the access permissions of the original document into consideration, when uploading it to the InLoox storage.

How to add a document

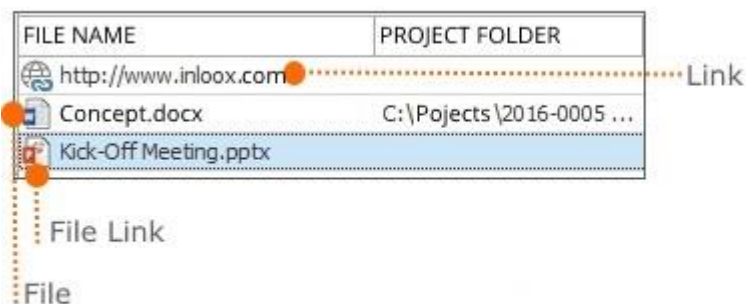
1. Open an existing project and click on **Documents** in the **Start** tab.
2. Click on the **Edit** tab and then on the arrow icon below **New**.



Choose between:

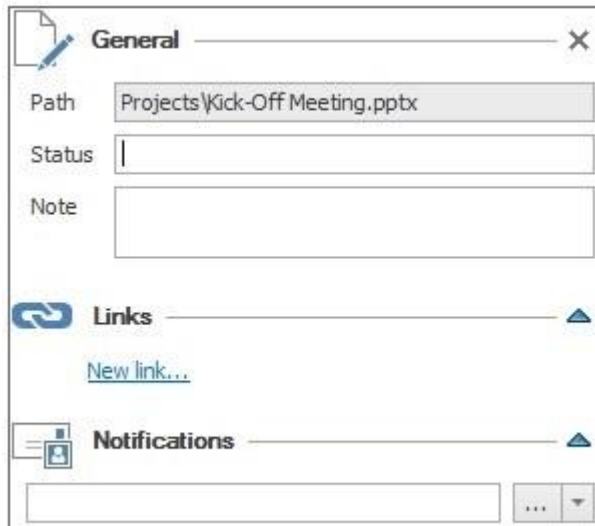
- **New File:** By using this feature, you can upload a document to the InLoox storage and save it to the project folder. When the Windows Explorer opens, select the document and click on **Open**.
- **New File Link:** By using this feature, you can create a link to the storage place of a document. The document isn't uploaded and doesn't occupy any storage space. When the Windows Explorer opens, select the document and click on **Open**.
- **New Link:** By using this feature, you can leave for example web addresses. After you have clicked on **New Link**, a side panel opens on the right side. In the path field you can save the web address.

3. Afterwards the new document is displayed in the document list of your project.



How to edit a document


1. Choose the document you want to edit from the document list.
2. Open the **Edit** tab and click on **Edit**. A side panel opens on the right side. Here you can enter important information regarding the document.




3. Add information in the **General** area.

- In the **Path** field you can see the storage place of the document. You can't edit this field.
- The **Status** field allows you to leave notes about the processing status like *in progress* or *completed*.
- In the **Note** field you can save all important information regarding the document. InLoox provides you with the various formatting features. For more information see 7. in [How to create a new project](#).

4. You can create links to other project elements (like mind maps, tasks ...) in the **Links** area.

- Click on **New Link...** and choose a project element you want to link to the document.
- Click on **Add** and on **OK**. InLoox displays the document as a paper clip on the page of the project element you have chosen. You can also open the document on this page.
- To delete the link, click on the delete icon  next to it.

5. In the **Notifications** area you can inform other persons, like the project manager, about new documents or changes in already existing documents.

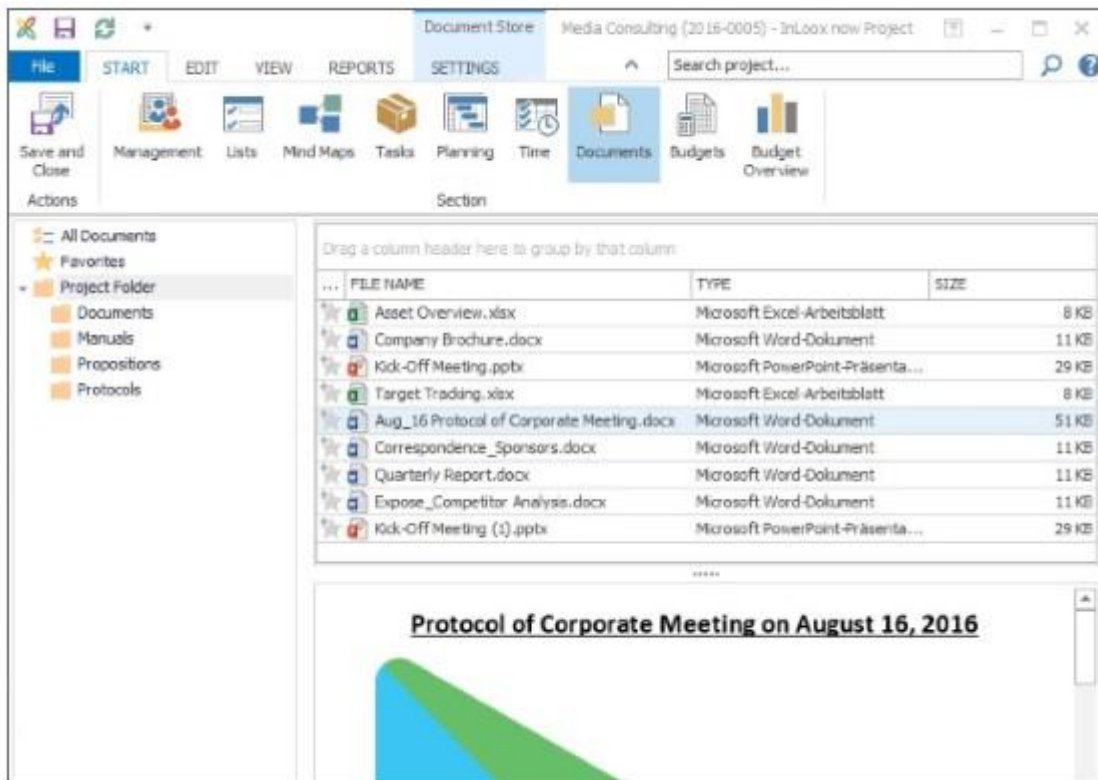
- Click on this icon , to select a resource.
- In the address book double-click on the name of the person you want to inform and then on **OK**.
- The selected resource will be notified via e-mail when you save and close the project.

6. When you have finished editing the document, close the side panel on the right side next to the **General** area. Your changes will be saved automatically.

The document list in a project

You can drop all important documents regarding your project in the document list. How to open the document list of a project:

1. Click on the **InLoox PM** or **InLoox now** tab and then click on **Projects**.
2. Double-click to open an existing project.
3. To open the document list, click on **Documents** in the **Start** tab.



Preview of internet URLs

In addition to file types such as Word, PowerPoint or Excel, stored web page URLs can now also be previewed in InLoox. You can even browse the website directly in InLoox - no need to open an extra browser window.


Drag a column header here to group by that column

...	FILE NAME	FOLDER	PROJECT FOLDER	TYPE	SIZE	UPL...	CAC...
★	Letter Trade Fair Promoter...	Projekte	Projekte	Mi...	18...	✓	☰
★	Feedback Project Contract...	Projekte	Projekte	O...	14...	✓	☰
★	InLoox_PM_9_Product_Fol...	Projekte	Projekte	Ad...	1,...	✓	☰
★	Presentation slider.pptx	Projekte	Projekte	Mi...	41...	✓	☰
	https://www.inloox.com/		Projekte	URL	0 KB		
★	Flyer.docx	Projekte	Projekte	Mi...	20...	✓	☰
★	Kick Off Meeting.pptx	Projekte	Projekte	Mi...	41...	✓	☰

InLoox Preview URLs and browse through the website directly in InLoox.

Tasks.
Projects.
Everything.


integrated in



Features on the Edit tab

To open a document, choose one from the list and click on Open. You need specific user permissions for this action.

Select a document from the list and send it via email. Or choose Send Link(s) in the drop-down-list to send the document path or the internet address.



Choose a folder from the document folder tree structure on the left and click on New Folder. A subfolder of the selected folder is created.

For more information on user permissions browse the articles how to set user permissions and user permission options.

Features in the View tab

Change the view of the document folder tree structure by clicking on Expand All/ Collapse All.

Change the preview for selected documents by choosing between Right, Bottom or Off.



Filter the document to quickly find needed information. Click on a field in the dialog box and drag it into the column headers. To reset the field, click on the field in the column headers and drag it into the empty space below the document list.

Features on the Settings tab

The **Settings** tab in InLoox now! has a different design than in InLoox PM. Reason for this are the different storage places. In InLoox PM your documents are saved on your file or SharePoint server, whereas in InLoox now! the documents are stored in the cloud.

In InLoox PM

Delete the document folder path.

InLoox sets a new document folder path according to the document folder rule as soon as further documents are added to the project.

Clean the project list and remove all unnecessary entries.



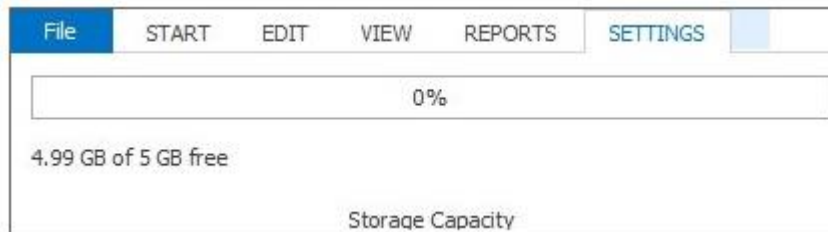
To edit the document folder path, click on the folder symbol.

Refresh the document list.

For more information on the document folder path, see [Save and edit the document folder path \(Only for InLoox PM\)](#).

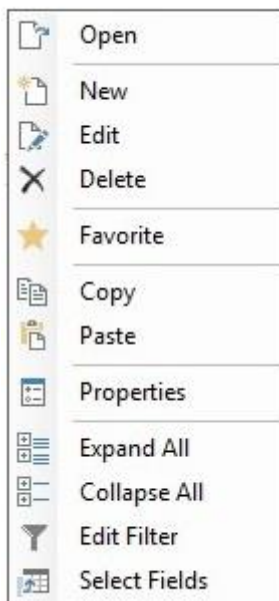
In InLoox now!

The **Settings** tab in InLoox now! only displays the occupied storage capacity in the cloud as a percentage.



Features in the context menu

The context menu provides you with all important core features that are also included in the Ribbon. To open the context menu right-click on any point in the document list.



Information rules

Document folder view

- The entry **All documents** displays all documents which are saved within the project.
- The entry **Favorites** displays all documents which have been marked in the ribbon as Favorites.
- The entry **Project folder** displays all the documents of the project file store excluding subfolder content. The Project folder can contain subentries by the means of a tree structure, representing the physical structure of the file store or the SharePoint system.

Preview area

- Choose a document from the document list in order to see it in the preview area. The preview area allows you to see the whole document with several pages.
- In the preview area you can directly use **Copy** and **Paste** features in the document.

NOTES

- Use the filter feature to quickly find needed data. For more information, see [Search and filter in a project](#)
- If a lock icon is displayed in the document list, you have no reading permission. In this case no document will be displayed in the list.

Clean up the document list in InLoox PM

You can directly upload documents to the InLoox storage space or you can create a file link. If you have created a file link and the original document is deleted from the document folder, the document can't be opened in InLoox anymore. To delete such unnecessary data, proceed as follows:

1. Open an existing project and click on **Documents** in the **Start** tab, to open the document list.
2. Choose All Documents or just a subfolder from the folder structure on the left side.
3. Open the **Settings** tab and click on **Clean Up Document List**.
4. Click on **Yes** in the new window, to permanently delete redundant or unnecessary data.



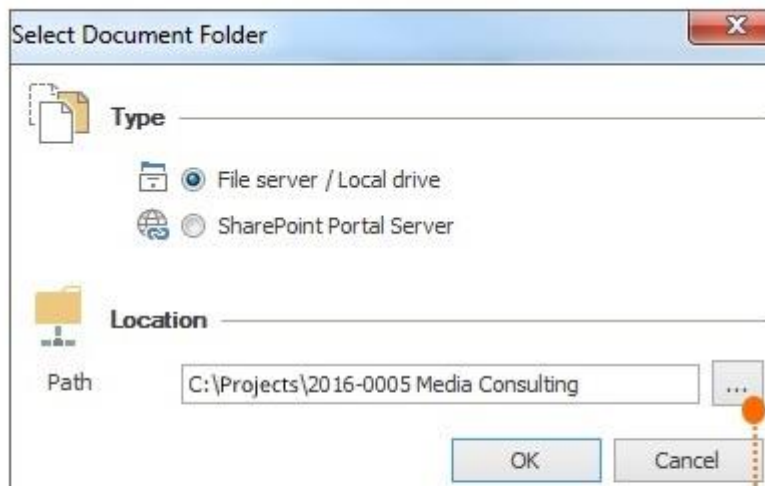
Create the document folder path in InLoox PM

InLoox PM organizes your file or SharePoint server. In every project you have access to all related documents. Using the document folder path you can easily link a folder that is stored on your server to InLoox. Afterwards you can read in and update stored documents from that folder with just one click.

The document folder path is only relevant for InLoox PM users, as documents of InLoox now! users are saved on the cloud.

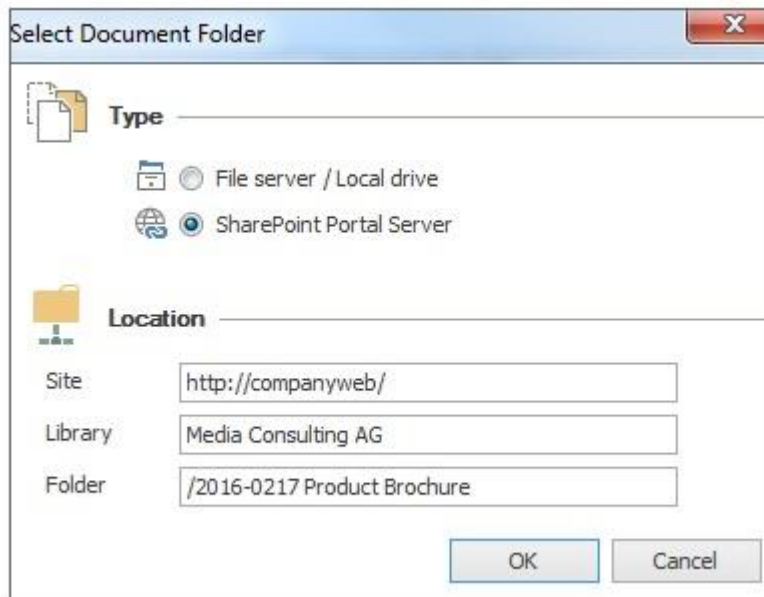
How to create the document folder path in InLoox PM

1. Open an existing project. Open the **Start** tab and select **Documents**. The document list of your project will open.
2. Open the **Settings** tab in the document list and click on the folder icon.
3. A new dialog box will open. There you can select the folder, which contains all important documents of your project:
 - In the **Type** area choose **File server/ Local Computer**, when the folder is stored on your computer or on a file server.



Click here, to search the folder on your computer/ file server. Select the folder and click on OK. Or create a new folder and choose it as the storage location.

In the **Type** area choose **SharePoint store**, when you are working with a SharePoint server. Therefore the SharePoint needs to be defined as the default storage place for documents in the InLoox Options. If the SharePoint is already defined as the default storage place for documents, all information about the location will be automatically displayed in the **Location** area. You just need to click on **OK**. For further information see Change the document folder path.

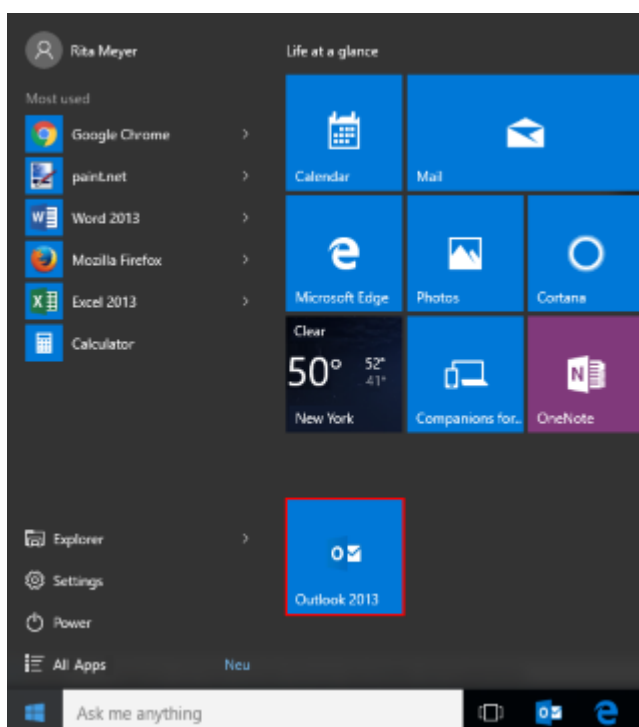


4. Open the **Settings** tab and click on **Update Document List** to read in all documents from the document folder. In the tree structure on the left side, the folder structure of the selected folder will be automatically displayed.

Getting started

Welcome to InLoox for Outlook! We compiled information that helps you get started with your first InLoox project.

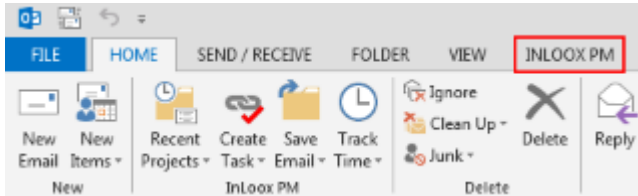
1. First, open Microsoft Outlook in your Windows start menu:



... or from your taskbar

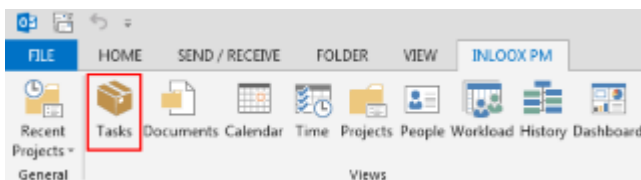


2. InLoox fully integrates with Microsoft Outlook and is always available with one click.

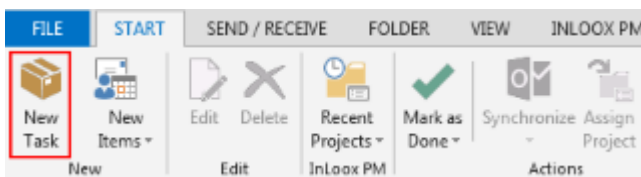


Open InLoox for Outlook by clicking on the **INLOOX PM** or **INLOOX NOW** tab in the **Microsoft Outlook Ribbon**.

3. To create your first task with InLoox, click on **Tasks** in the **Views** group on the **InLoox Ribbon**.



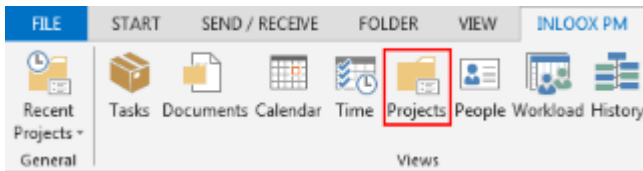
4. Click on **New Task** in the **New** group to create a new task.



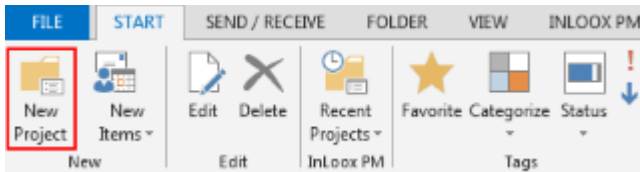
5. Use the side panel on the right to enter all the details regarding your task.

Congratulations, you have just created your first task with InLoox PM!

1. To create your first project with InLoox, please click on the **INLOOX PM** or **INLOOX NOW** tab, then click on **Projects** on the Ribbon in the **Views** group.



2. By clicking on **New Project** in the Ribbon on the **Start** tab in the **New** group, you will get to the management form.



3. Please enter all basic data regarding your project in the management form.

 A screenshot of the 'New Project' management form. The form is divided into several sections:

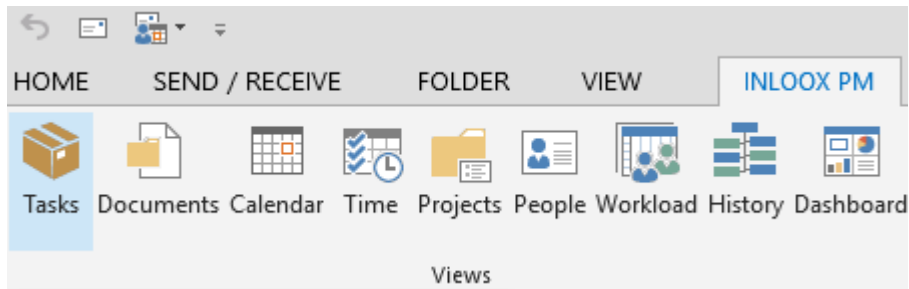
- Project**: Includes fields for Name, Number (with a dropdown set to '2015-' and an 'auto' button), Division, Customer, and Category.
- Staff**: Includes dropdowns for Project Manager (set to 'Bita Meyer'), Team, Customer, Partner, and More.
- Status / Date**: Includes a Status dropdown (set to 'In Progress'), Start date (set to 'Friday, December 11, 2015'), and End date (set to 'Saturday, December 12, 2015').
- Custom**: Includes a Risk dropdown.

Global task view

Warning As of version 9, work packages were renamed tasks.

The task view outside of the projects is particularly useful for heads of project teams and other team leaders to gain an overview of all tasks across all projects. Team members can use it to work on project-related tasks and personal tasks from their daily business in one place.

In InLoox, tasks don't have to be necessarily related to a project, they can be created and edited without any reference to a specific project. To get to the task list, click on the **InLoox PM** or **InLoox now!** tab and on the **Tasks** button in the Ribbon.



Content of the global task view

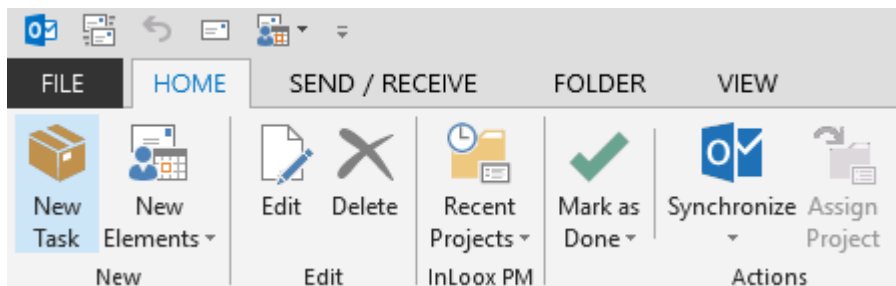
In the global task view, you see all tasks you have a reading permission for. The task list shows both project-related and personal tasks. The InLoox Administrator can set and change permissions in the InLoox options.

Tasks that are overdue appear in red.

Create, edit and delete tasks

Create and edit tasks

To create a new task, click in the Ribbon on the **Home** tab on **New task**. You will be automatically the responsible resource for this task.



To further edit this task, click in the Ribbon on the **Home** tab on **Edit**.

1. In the side panel on the right, you can now rename the task and add a description of the task.

i Your personal task was delegated to Rita Meyer.

✎
Basic Information
✕

Name ✓

Description

Effort Working Days i

Resource ...

Start

End

📁
Documents
▲

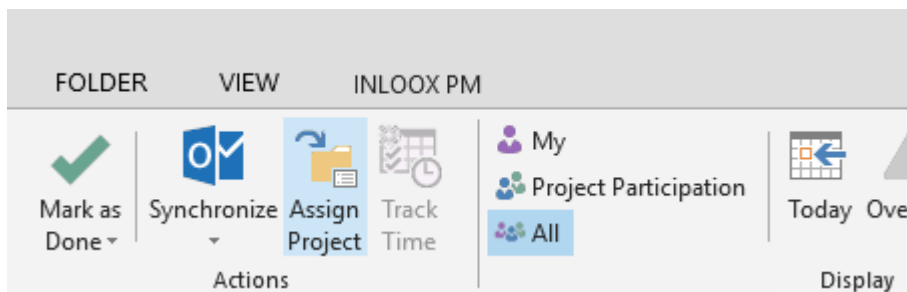
[New link...](#)

2. You can also set the estimated effort required for the task. A working day equals 8 hours by default. With the arrow next to working days, you can set whether you want to display the effort in working days, hours or minutes.
3. A personal task, i.e. a task unrelated to a specific project, has to be assigned to a resource. If you aren't in charge of the task yourself, you can assign the task to another resource. A click on the little arrow offers you a quick selection of frequently used resources, a click on the three dots opens the global address book. A task can only be assigned to *one* resource to guarantee clear responsibilities.
4. You can set the time frame for the task (i.e. the start and end date), but you don't have to.
5. Click on **New link...** in the **Documents** area to add a document to the task. You will then see an overview of all documents that have been added to InLoox and that you have reading permissions for. You can also add a new document by clicking on **New**. Now you can select a new document from your computer or your file server.

Assign a task to a project

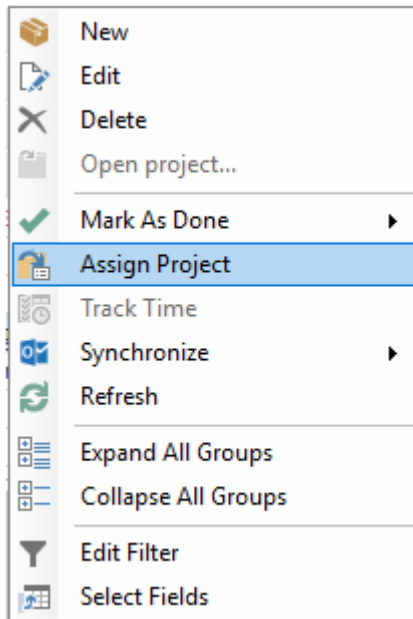
Tasks that you create in the cross-project task list are personal tasks by default and are not related to a specific project. If you want to change that, please follow these steps:

1. Click on the task in the task list that you want to assign to a project. The task is not supposed to be assigned to any other project yet.
2. Click in the Ribbon on the **Home** tab on **Assign Project**.



3. You will see a list of all projects that you have reading permissions for. Please select the regarding project and confirm with **OK**.

Alternatively, you can also find this command in the context menu. Right-click on the task that you want to assign. You will find **Assign Project** there, too.



As soon as a task has been assigned to a project, there will be a note in the side panel on the right regarding the project. You can click onto the project name to get directly to the project. If the task has been assigned to a specific activity in the Gantt chart, the time frame of the activity will determine the start and end date of the task. You can change that manually, as long as task is performed within the time frame of the activity.

Project Trade Fair

Basic Information ✕

Name 📧 ✓

Description

Effort Working Days ⌵ ℹ

Resource ⋮ ⌵

Start ⌵

End ⌵

Documents ⬆

[New link...](#)

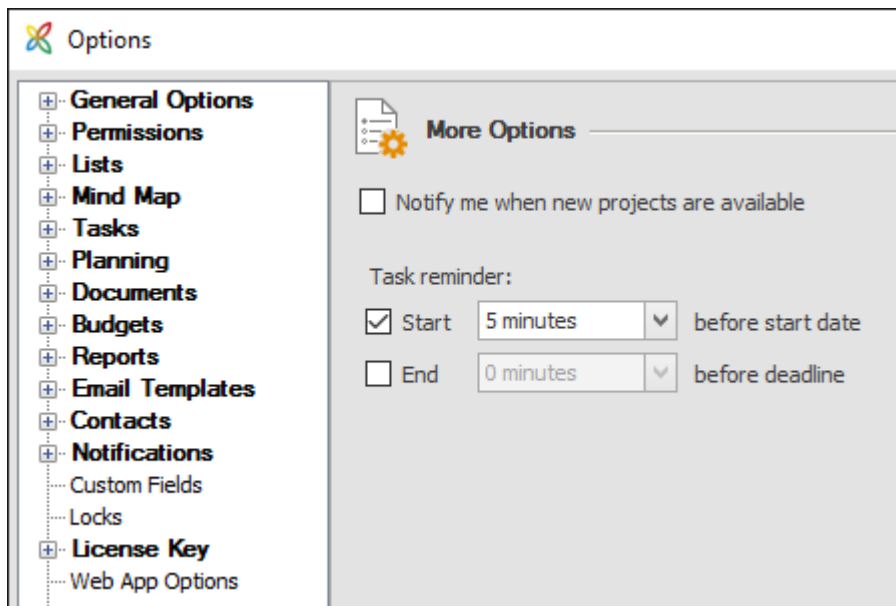
Notifications ⬆

⋮ ⌵

Notifications and notes

Every InLoox user can determine in the user settings how and when he or she wants to be notified about upcoming tasks.

1. In Outlook, click on the **File** tab, then under InLoox, select **Options**.
2. In the Options dialog, click in the navigation pane on the left on **User Settings, More Options**.
3. Now you can set how and if you want to be notified before the start and/or the end of your tasks.



You can specify persons that you want to notify about new notes on the task. If a task is related to a project, you can notify other persons about changes on the task.

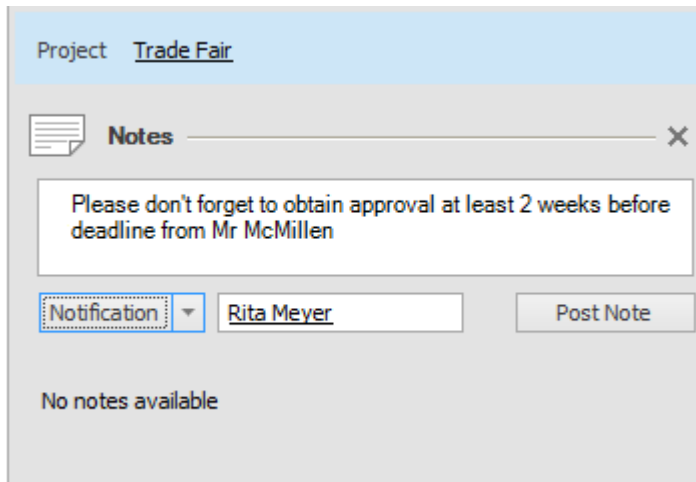
Important The resource in charge of the task will be notified automatically if there are changes made to the task.

The notification field is meant to notify other people such as the project manager. The arrow leads you to a quick selection of frequently used resources, whereas clicking on the three dots opens the global address book.

If you want to add additional information on the task, you can add notes. At the bottom of the editing side panel, click on the **Notes** tab:



You can enter persons that you want to notify about new notes on the task.



Project Trade Fair

Notes ✕

Please don't forget to obtain approval at least 2 weeks before deadline from Mr McMillen

Notification ▾ Rita Meyer Post Note

No notes available

1. Enter your project note.
2. If you want to inform someone about it, click on the small arrow right to Notification for a quick selection of frequently used resources or click on **Notification** to open the global address book.
3. Then click on **Post Note**.

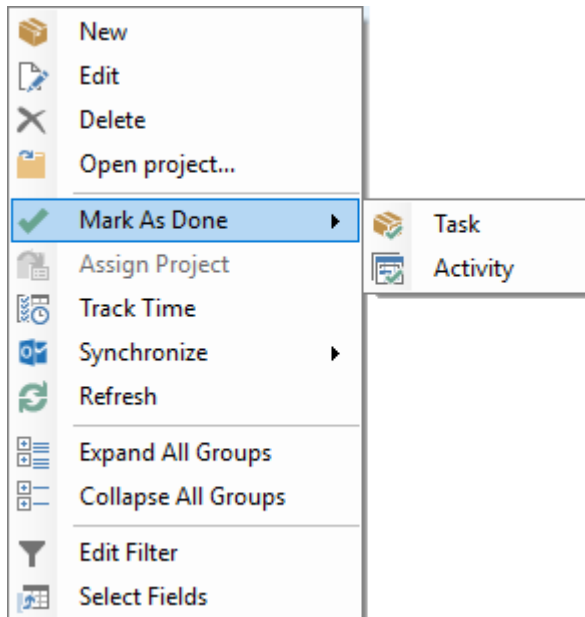
You can also add notes with notifications to tasks that are unrelated to a specific project.

The InLoox Administrator can determine in the [options](#) how InLoox users are notified.

Mark tasks as done

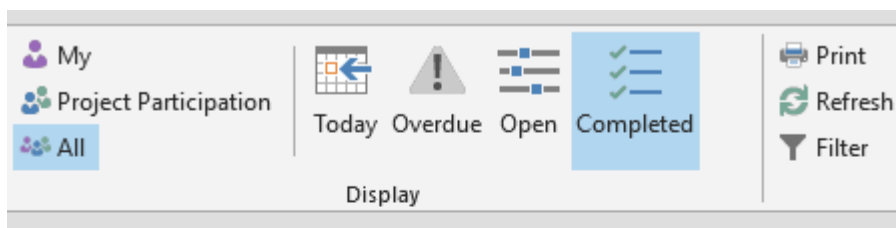
You can mark finished tasks as done directly in the task list. You have several options:

- If you have added the Done column to your task list (the column with a green check), you can mark a task as done by activating the check box for this task in this column.
- Alternatively, you can also right-click on the task in the task list and select **Mark As Done** in the context menu. If the task is related to a project, you can determine whether you only want to mark the task as done or whether you want to also mark the activity in the project plan as done to which the task belongs.



- You'll find the same feature in the Ribbon on the **Home** tab. Click on the respective task and click on **Mark as Done** in the Ribbon

Marking a task as done has several effects:



RESOURCE		TASK	DUE DATE
-	<input checked="" type="checkbox"/>	Customer Newsletter	4/13/2016
-	<input checked="" type="checkbox"/>	Concept for booth specials	4/13/2016
-	<input checked="" type="checkbox"/>	Displays	4/12/2016

- When you mark a task as done it will disappear from your task list if you have activated the filters Today, Overdue or Open and will be shown as a completed task.
- If the task is related to a specific project the completion of the task is reported back into the project and is taken into account in the calculation of the project progress.
- If you have activated notifications for the task the person/-s are notified about the completion of the task.
- If you as a project manager mark the task as done and you are not in charge of carrying out the task yourself, the resource assigned to task will be informed automatically.

Delete a task

You can delete tasks by clicking on the task you want to delete in the list and then click in the Ribbon on the **Home** tab on the **Delete** button. You'll also find this command in the context menu. You get to the context menu by right-clicking on the task that you want to delete.

If you delete a task, the people for which you have added notifications will be informed about it. If you as a project manager delete a task for which another resource is in charge of, the resource will be informed.

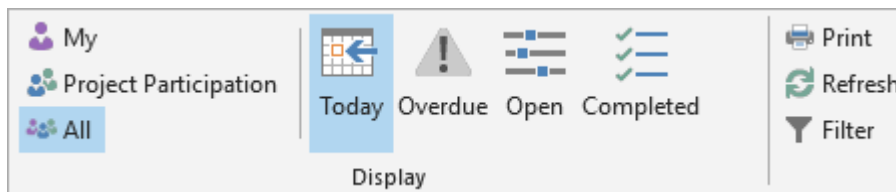
Warning Deleted tasks are removed permanently – you are not able to restore them.

Tip If you want to delete several tasks at the same time, you can use Multi-Select. Press and hold the **CTRL** key on your keyboard and click on the tasks that you want to delete at the same time. Now select the **Delete** button in the Ribbon.

Filter options

In order to work with the task list more efficiently and to get a better overview of a multitude of tasks, InLoox offers you several filter options.

On the **Home** tab in the **Display** group, you can filter the list by the form of your participation and by the due date of the task:



By participation:

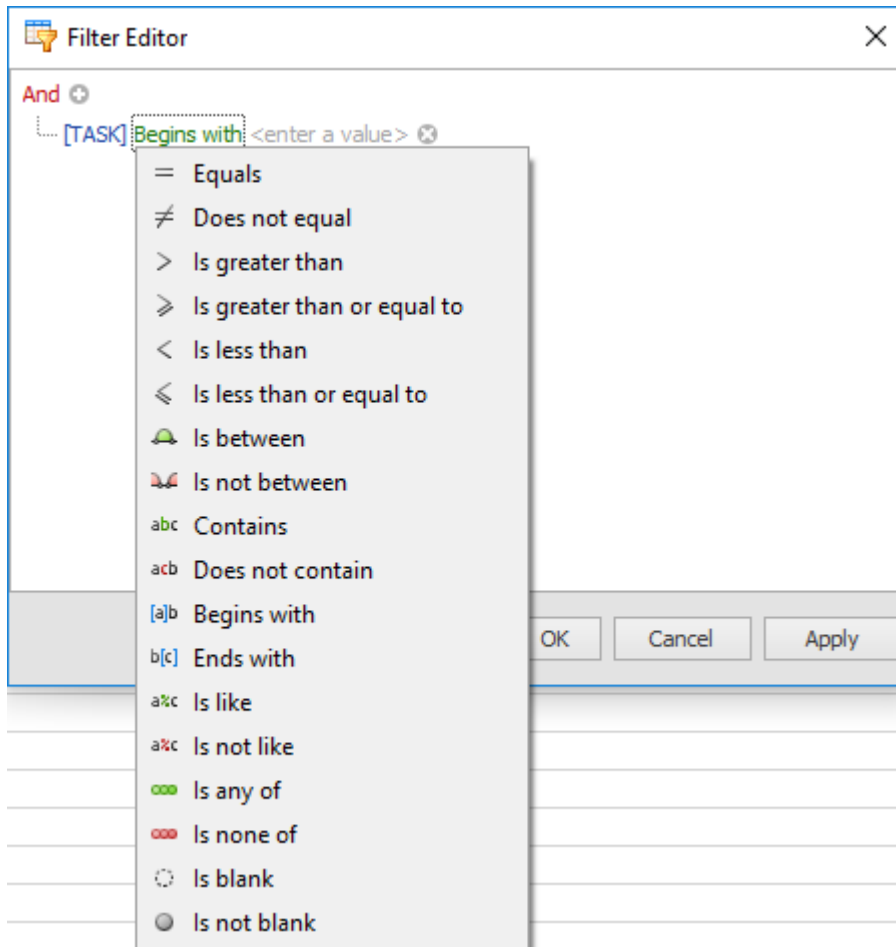
- **My:** Shows all tasks that have been assigned to you, i.e. the tasks you are supposed to carry out.
- **Project Participation:** Shows all tasks from projects that you participate in whatever role (e.g. as project manager, team member, customer...). You can determine who participates in a project on the Management page of the project.
- **All:** Shows all tasks for which you have a reading permission.

By due date:

- **Today:** Shows all tasks that are due today.
- **Overdue:** Shows all tasks that were due in the past.
- **Open:** Shows all tasks that have not been completed yet including tasks that are due today and overdue tasks.
- **Completed:** Shows tasks that have already been marked as done.

Analytical filter

In addition to the filter options above, you can also use advanced filter options by applying the analytical filter. You'll find the **Filter** button on the **Home** tab in the **Current View** group.

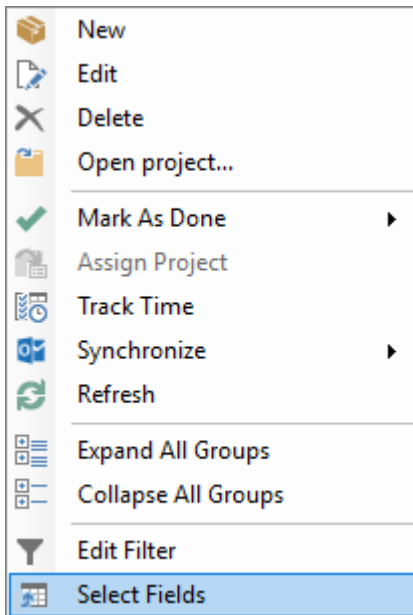


Customize the list view

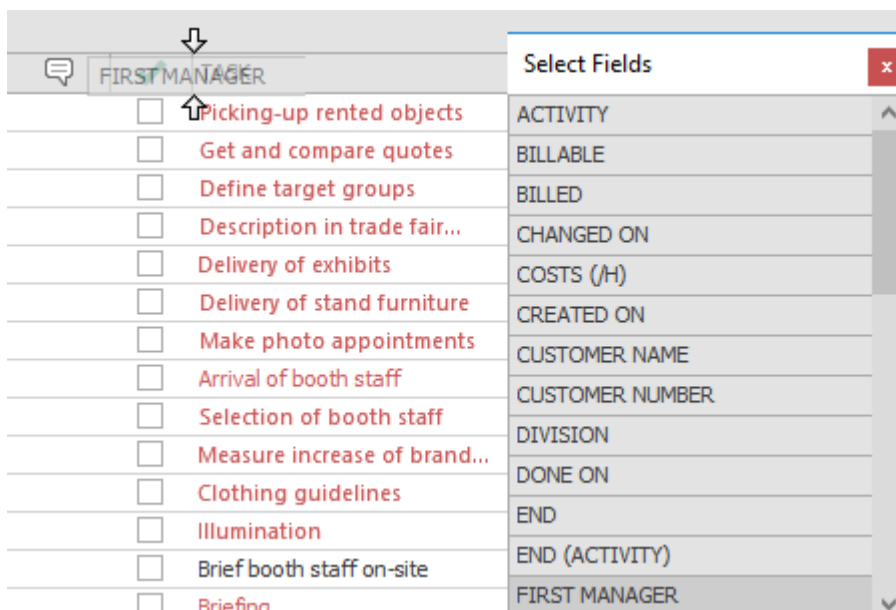
To customize the list view according to your needs you have several options:

Add and remove fields

You'll find a multitude of information in the task list that you can add to or remove from the list in the form of table columns:



Right-click on the task list and choose **Select Fields** in the context menu. If you want to add one of the fields to your list, drag it with the mouse into the column header.



To remove a field from the task list, drag it with your mouse back into the Select fields dialog.

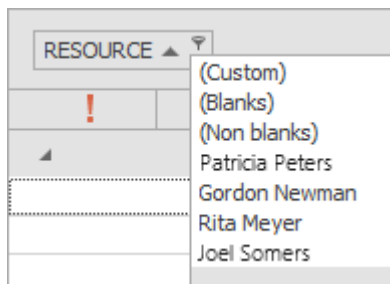
Group

In order to group tasks by certain criteria, drag the field that you want to group by into the Group field above the column headers.

RESOURCE ▲			
!	☰	✓	TASK ▲
		DUE DATE	
▲ Gordon Newman			
<input type="checkbox"/>		Delivery of exhibits	4/22/2016
<input type="checkbox"/>		Arrival of booth staff	4/13/2016
▲ Rita Meyer			
<input type="checkbox"/>		Briefing	4/15/2016
<input type="checkbox"/>		Motto/Claim	4/14/2016
▲ Sabine Pfleger			
<input type="checkbox"/>		Distribute packing list	14/27/2016

When you click on the little arrow next to the group criterion, you can decide whether you want to sort the tasks in ascending or descending order.

Here, you have again the option to filter the task list: Move the cursor over the group criterion to show a little filter symbol. Click on the filter symbol to narrow down the group criterion.



Sort

You can also sort the task list by clicking onto the column header that you want to sort by. Click again to change the collation.

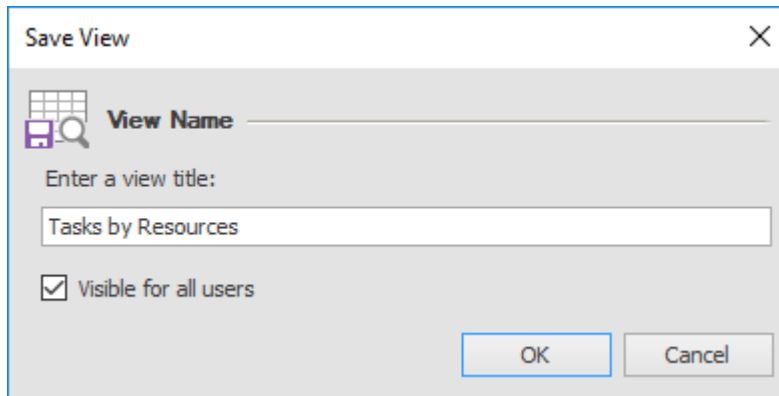
Conditional formatting

You can also format the task list according to rules that you define by using Conditional Formatting. You'll find this feature in the Ribbon on the **Home** tab in the **Current View** group. Please read the Conditional Formatting chapter to learn how to work best with conditional formatting.

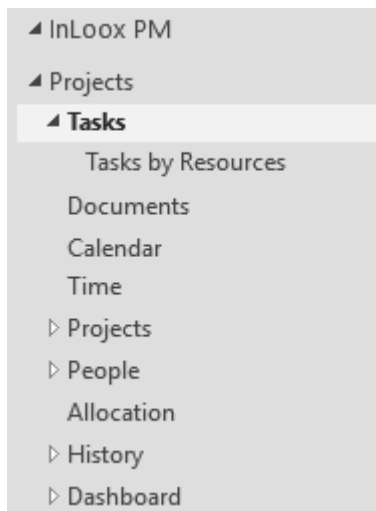
Save and re-use views

When you have customized your task list in a way that suits you best, you can save this view in the database and make it available to other InLoox users on the same database.

Click on the **Home** tab in the Ribbon on **Save, Save Current View...** Now you can name the current view. You can also choose whether this view is supposed to be available to all InLoox users or only to yourself.



You can access the saved view in the Outlook folder pane on the left below tasks.



The changes you make to your default task list are saved automatically locally on your computer and are available automatically, as soon as you open the task list the next time.

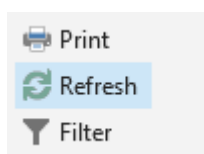
Track time efforts

You can also track working times directly out of the task list. Click on the task on which you spent the working time. Then click in the Ribbon on the **Home** tab on the **Track Time** button.

Learn more about tracking working times in the chapter Time Tracking.

Refreshing tasks

If there are many projects in the InLoox database, team members constantly add new tasks, change or delete existing tasks.

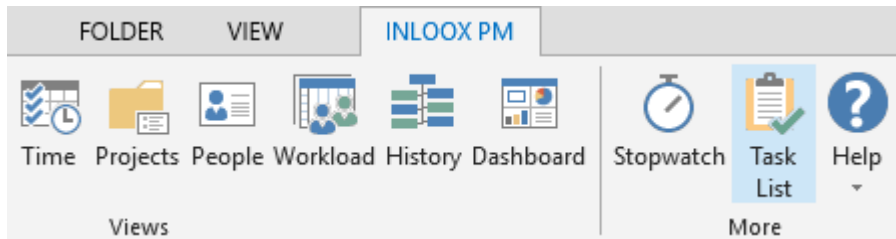


You can stay on top of your tasks by refreshing the task list manually. Click on the **Refresh** button in the Ribbon on the **Home** tab.

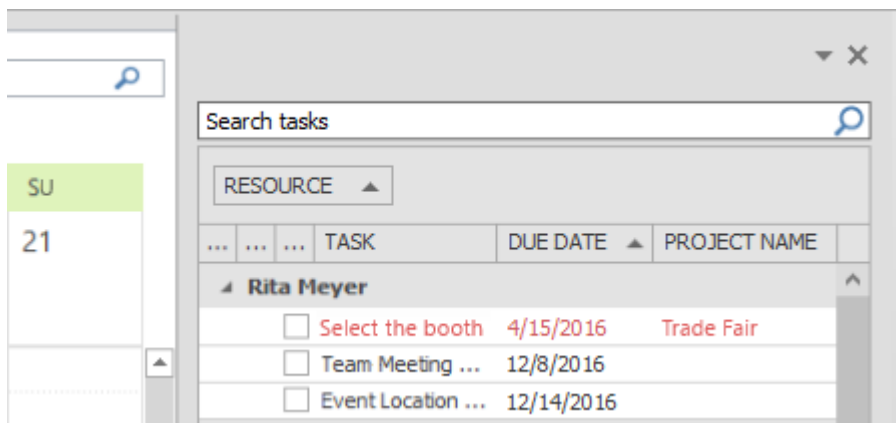
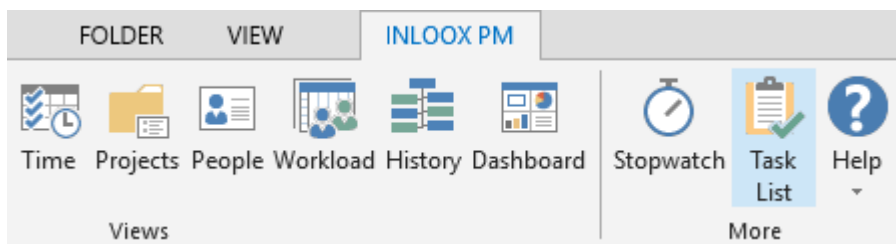
The InLoox Administrator can set a fixed interval to refresh the task list automatically in the InLoox options. You'll find the settings when you click on the **File tab, InLoox options, General options, More options**. You can set the update interval in minutes on the bottom right side (administrator permissions necessary).

Task list in the side panel

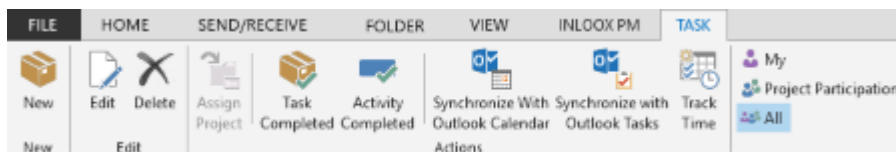
To gain an even better overview of your InLoox tasks while you are working in Outlook or in the global sections of InLoox, you can also open the global task list in a side panel next to any Outlook view.



To open the side panel click on the **InLoox PM** or **InLoox now!** tab, then on **Task List**. To close the task you can go the same way or click on the little cross in the top right corner of the side panel.



Click on any spot in the side panel to activate the Tasks tab where you'll find all commands that you know from the global task list in the full-screen mode.

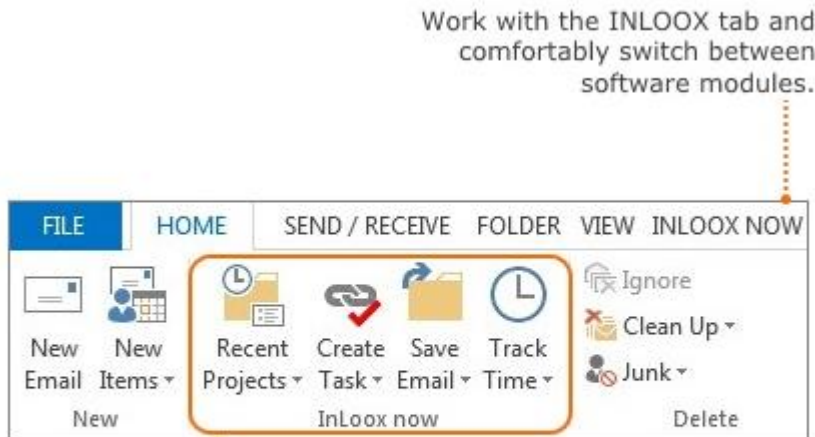


Please read the chapter Global task view to learn how you can use these features and how you can customize the contents of the task list.

Here you can find InLoox in Outlook

InLoox on the home tab

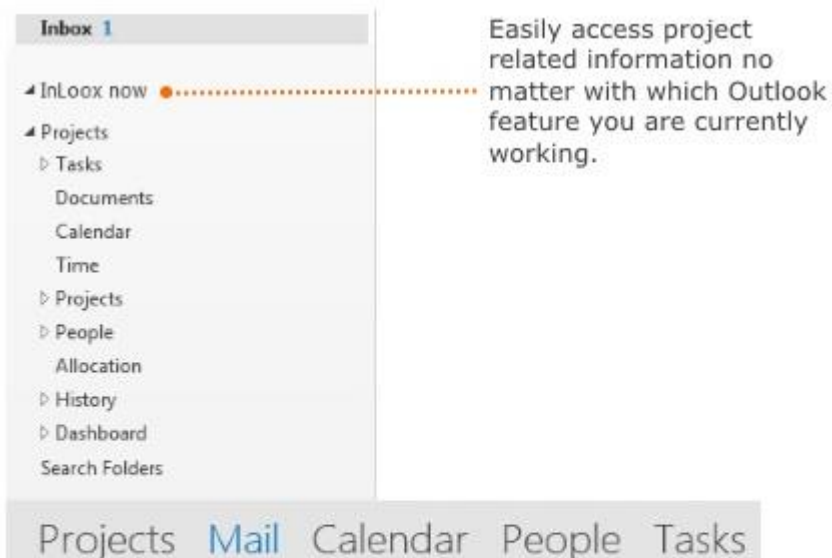
You work with Microsoft Outlook most of the day, this is why we want to make sure that you can easily access InLoox directly from within Microsoft Outlook. Therefore your Microsoft Outlook home tab is supplemented by additional InLoox options:



You can access 4 InLoox options on the home tab.

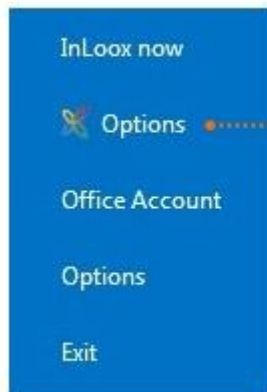
InLoox in the side panel

The InLoox folder structure is also included in the Outlook side panel on the left of the window. You can find the InLoox folder directly below your Inbox. The navigation menu is extended, too.



Within the navigation menu you can find the project area.

InLoox PM or InLoox now options



Click on File to access the options.
You can find the InLoox options directly above the Outlook options.

History

Track the changes of all projects

The project history allows you to chronologically track all changes of all projects you are involved (you need to have reading permission). Every change that is made by the project staff is documented in the **global project history** after the person has saved and closed the project.

Staff stands for all persons that are mentioned in a project in the area *Staff* as project manager, team, customer, partner or others. Additionally staff members need the appropriate permissions, to not only being able to read project information, but rather being allowed to change it. (Permissions can be edited in the [InLoox options](#) by InLoox admins)

How to open the history

1. Open the **InLoox PM** or **InLoox now** tab and click on **History**. Another option is to select the history from the tree structure on the left side. Therefore click on **InLoox PM** or **InLoox now** in the tree structure directly below your Outlook folders and open the section **Projects**. Now you can select the **History**.
2. The global project history opens and shows all changes of all projects you are involved.

View and features in the history

The project history chronologically shows all changes of all projects.

All changes are displayed chronologically by date and time.

The changed project is listed above every change note.

Blue contents highlight the person that has made the change.

Purple contents show the project information that has been changed.

Red contents display the new value of the changed project information.

- Blue contents highlight the person that has made the change.
- Purple contents show the project information that has been changed.
- Red contents display the new value of the changed project information.

Selected features in the history

1. You can open highlighted projects, notes, project information or staff members from the history. How to get more information on each element of the change note:

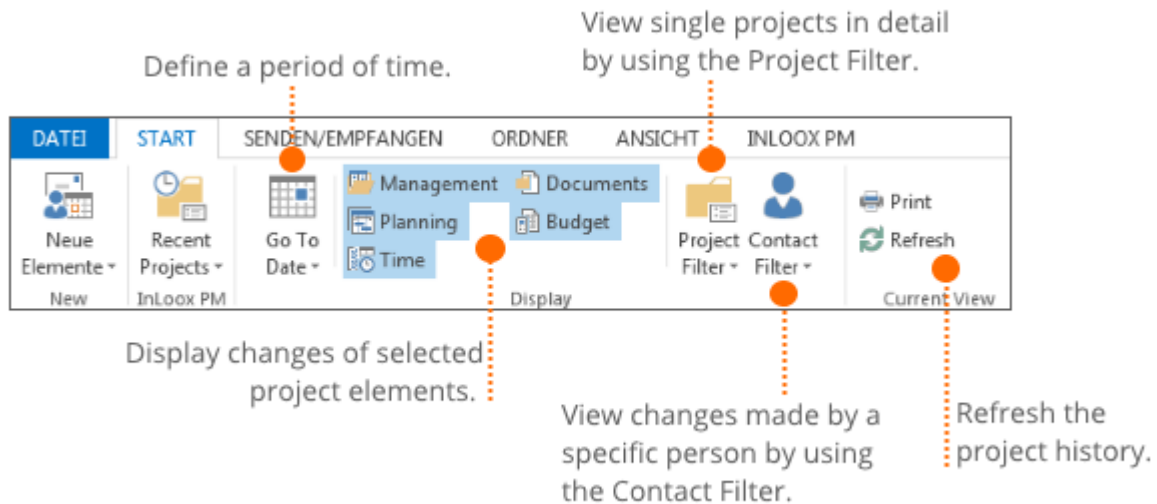
- Click on the project name to open the project.
- Click on the staff member (blue) to open their entry in the address book.
- By clicking on the changed project information (purple) you open this element in its respective project.

2. To delete change notes from the history, click on the cross directly next to the information.

3. Sometimes the change note can be too long and can't be showed as a whole in the history. To receive all information about the change, slowly guide your mouse pointer over the change and the whole change will be showed.

How to organize the view and use filters

The **Start** tab provides you with several features to further structure and filter the project history.



Define a period of time

Define the period of time for that you want to see the changes. Therefore you can choose between today, yesterday, day before yesterday and custom.

Display changes of selected project elements

By using the blue buttons you can filter the changes by specific project elements like Management, Planning, Time, Documents or Budget. This is very useful, when you only want to see changes of a specific area of all projects. You can combine several project elements. If a button is blue, the respective project element is selected and all changes of that area are viewed in the history. In the screenshot: All changes of all project elements are viewed, as all buttons are selected and blue.

Project Filter

You can use the project filter to limit the history to the changes of a specific project. Additionally, you can combine the project filter with the display of selected project elements and the contact filter.

Contact Filter

You can use the contact filter to limit the changes to the changes a specific staff member has made.

Example on how to organize the view and use filters

You want to reproduce the changes that have been made by the staff member "Rita Meyer" in the project "Product Brochure" yesterday. To customize the view corresponding to your needs, proceed as follows:

1. Click on the arrow next to the button **Go To Date** and choose the needed date (here: yesterday) from the drop-down-list.

2. In the Display area, click on all project elements until only the needed button(s) (here: Planning) are highlighted blue and are selected thereby.
3. Define the **Project Filter** and choose the needed project (here: Product Brochure).
4. For the **Contact Filter** choose the staff member (here: Rita Meyer).

Now you can see only those changes that have been made yesterday by the selected staff member in the planning of your selected project.

This example illustrates the amount of options that are provided by the project history. You can customize the global project history by using and combining several filters.

InLoox options

You can customize and configure most of the InLoox features within the InLoox options.

User permissions

To change global settings in the InLoox options you will need specific user permissions. For more information on permissions browse the articles: How to set user permissions and User permission options.

How to open the InLoox options

Click on **File** in the upper left corner. On the side panel click on the InLoox options

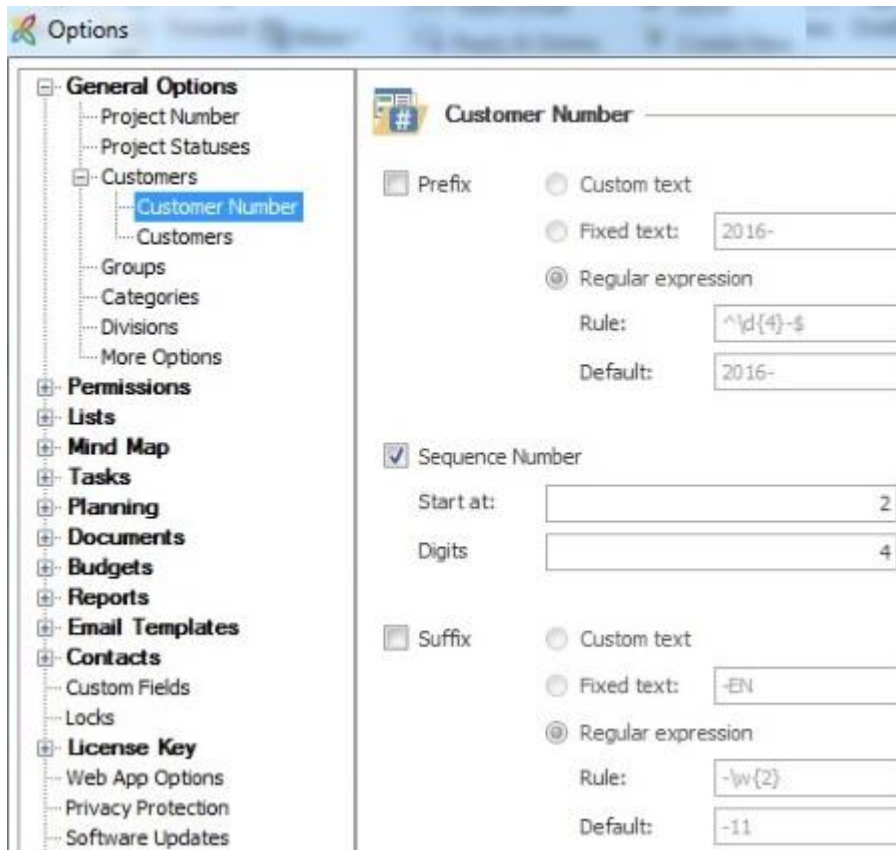
button  .

Adjust the customer number

The InLoox options provide various possibilities to edit the customer number. In the customer number area you also can define the rules for the number format.

Adjust a customer number

1. Open the InLoox options by clicking on **File** in the left corner. Afterwards click on the InLoox options button
2. Select **General Options**, click on **Customers** and then on **Customer Number**.



3. Individually edit the customer number:

- Prefix = Project number is displayed as a preceding character string.
- Sequence number = Project number is automatically continued.
- Suffix = Project number is displayed as a following character string.

For the number setting you need at least a prefix or a sequence number. You can combine a prefix or a suffix with a sequence number.

4. Click on **OK** or **Apply** to save your changes.

Mode description for prefix and suffix

Mode	Data type and significance
Any text	Any changeable character string of any length.
Fix text	Any character string of any length, which cannot be changed , e.g. the word project .
Regular expression	To define the format of the customer number insert a Regular expression and a Default .

Mode	Data type and significance
------	----------------------------

Please note the format rules, for more information see: [Change the number format.](#)

Examples of common formats

Example	Configuration
<p>Four-digit year combined with sequence number (e.g. "2016-008")</p> <p>components:</p> <ul style="list-style-type: none"> "2016-" (fixed prefix with year). "Sequence number" (maximum 3 digits with leading zeroes). 	<p>Prefix:</p> <ul style="list-style-type: none"> Rule: <code>^\d{4}-\$</code> Default: 2016- or 2015- <p>Sequence number: Digits: 3</p> <p>Suffix: none</p>
<p>Sequence number with country code</p> <p>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: Digits: 5</p> <p>Suffix:</p> <ul style="list-style-type: none"> Regular expression: <code>^\w{2}\$</code> Default: -DE
<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: Digits : 6</p> <p>Suffix: none</p>
<p>Free format</p>	<p>Prefix: any text</p>

Example**Configuration****Sequence number:** none**Suffix:** none**WARNING** Effects of changing the number format:


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

Adjust the division structure

InLoox provides its own division structure that is independent of the division structure in Outlook. The InLoox division structure is only available within the **InLoox PM Enterprise Edition**.

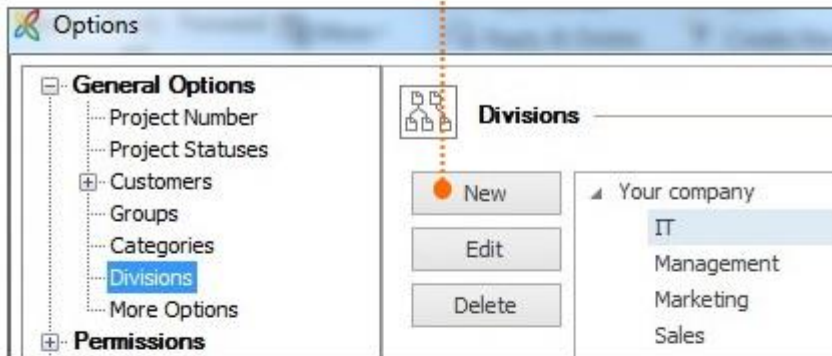
The division structure can be subdivided into as many levels as needed. You can assign whole division to a project. Additionally, the division structure supports you in assigning tasks to resources.

Create a new division

1. Open the InLoox options by clicking on **File** in the upper left corner. Afterwards click on the InLoox options button 

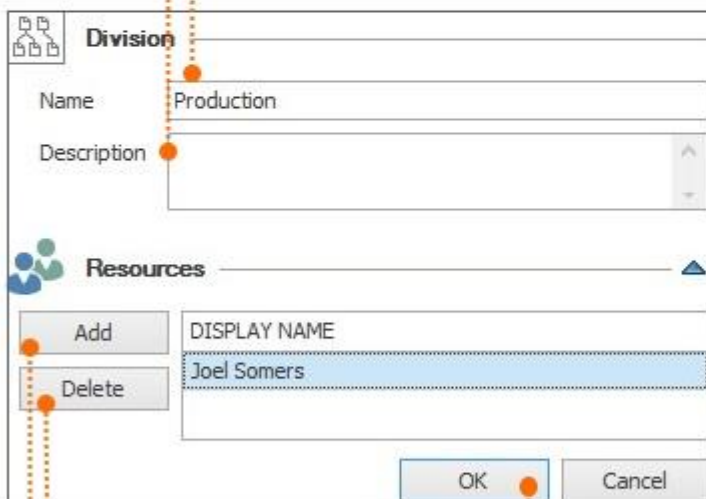
2. Select **General Options** and click on **Divisions**.

Click on New to create a new division.



Describe the division, if needed.

Name the new division.



To delete a chosen resource click on Delete.

Click on Add to select a resource from the address book.

To create the division click on OK.

3. To save your changes click on **OK** or **Apply**.

Edit and Delete already existing divisions

- Choose a division and click on **Edit** to customize the chosen division.

- Click on **Delete** to remove a chosen division from the division list.

Effects of creating, editing and deleting a division


- The renaming of a division immediately affects all relevant projects.
- The deletion of a division immediately affects all relevant projects.
- A new division is visible on the management and tasks page when adding a resource.

Adjust the project number

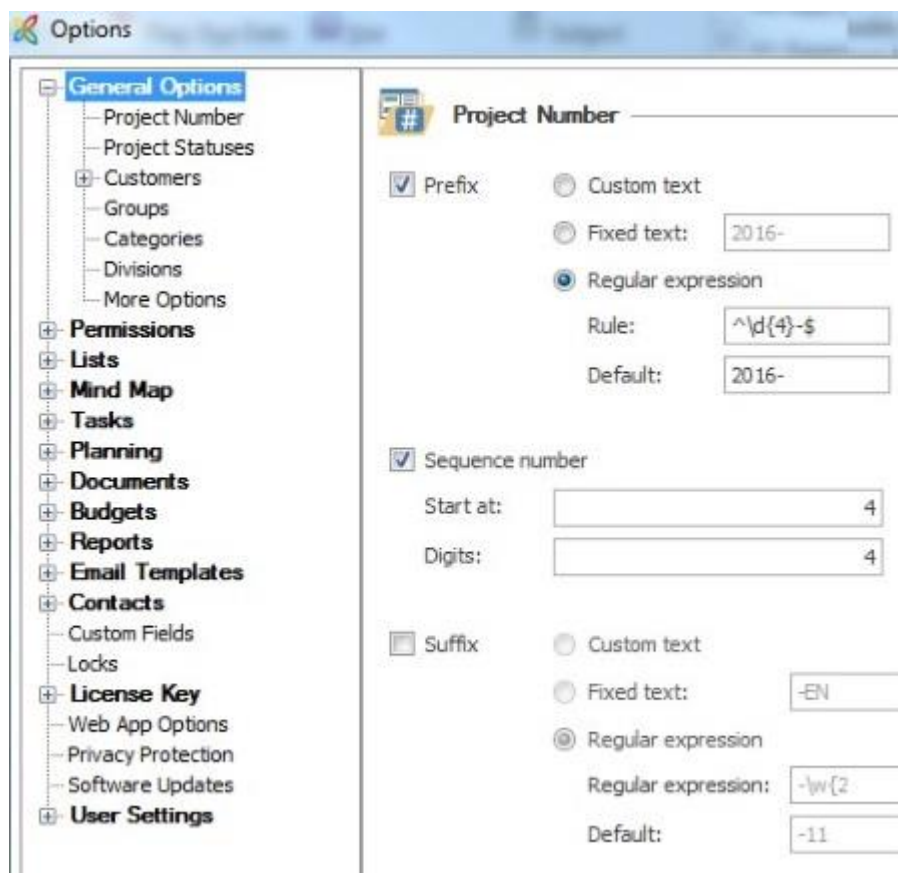
Within the InLoox options you can individually edit the project number.

TIP The options define the project number format. For more information see Change the number format.

Edit the project number

1. Open the InLoox options by clicking on **File** in the left corner. Afterwards click on the InLoox options button  button

2. Select **General Options** and click on **Project Number**.



3. Individually edit the project number by using one of the three options or combining them.

- Prefix = Project number is displayed as a preceding character string.

- Sequence number = Project number is automatically continued.
- Suffix = Project number is displayed as a following character string.

4. Click on **OK** or **Apply** to save your changes.

Mode description for prefix and suffix

Mode	Data type and significance
Custom text	Any changeable character string of any length.
Fixed text	Any character string of any length, which cannot be changed , e.g. the word project- .
Regular expression	To define the format of the project number insert a Regular expression and a Default . Please note the format rules, for more information see Change the number format .

Examples of common formats

Example	Configuration
<p>Four-digit year combined with sequence number (e.g. "2016-008")</p> <p>components:</p> <ul style="list-style-type: none"> • "2016-" (fixed prefix with year). • "Sequence number" (maximum 3 digits with leading zeroes). 	<p>Prefix:</p> <ul style="list-style-type: none"> • Rule: <code>^\d{4}-</code> • Default: 2015- or 2016- <p>Sequence number: Digits: 3</p> <p>Suffix: none</p>
<p>Sequence number with country code</p> <p>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: Digits: 5</p> <p>Suffix:</p> <ul style="list-style-type: none"> • Rule: <code>^\w{2}</code> • Default: -DE
<p>Simple sequence number</p>	<p>Prefix: none</p>

Example

- "Sequence number" (maximum 6 digits with leading zeroes).

Configuration**Sequence number:** Digits : 6**Suffix:** none**Free format****Prefix:** any text**Sequence number:** none**Suffix:** none

WARNING Effects of changing the number format:

- New projects are created automatically with project numbers in the new format.
- Existing projects retain their old numbers.
- Once assigned sequence numbers cannot be used again.

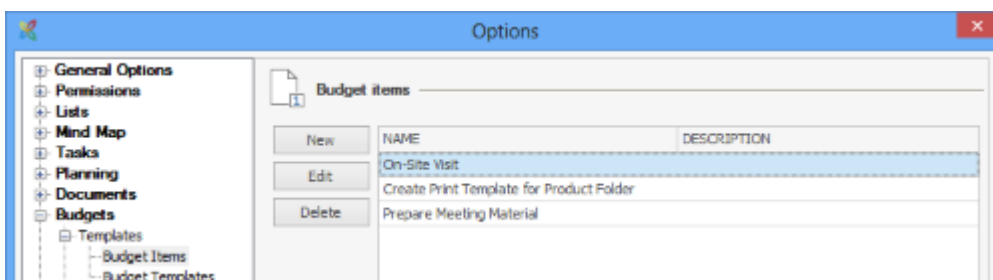
Budgets

Manage budget and budget item templates

Templates allow you to quickly re-create a budget or budget item, instead of having to create a new one from scratch. You can create, edit and delete budget items and budget templates in the InLoox Options. To get there, click on **File** in the upper left hand corner of Microsoft Outlook and then navigate to **InLoox Options >> Budgets >> Templates**.

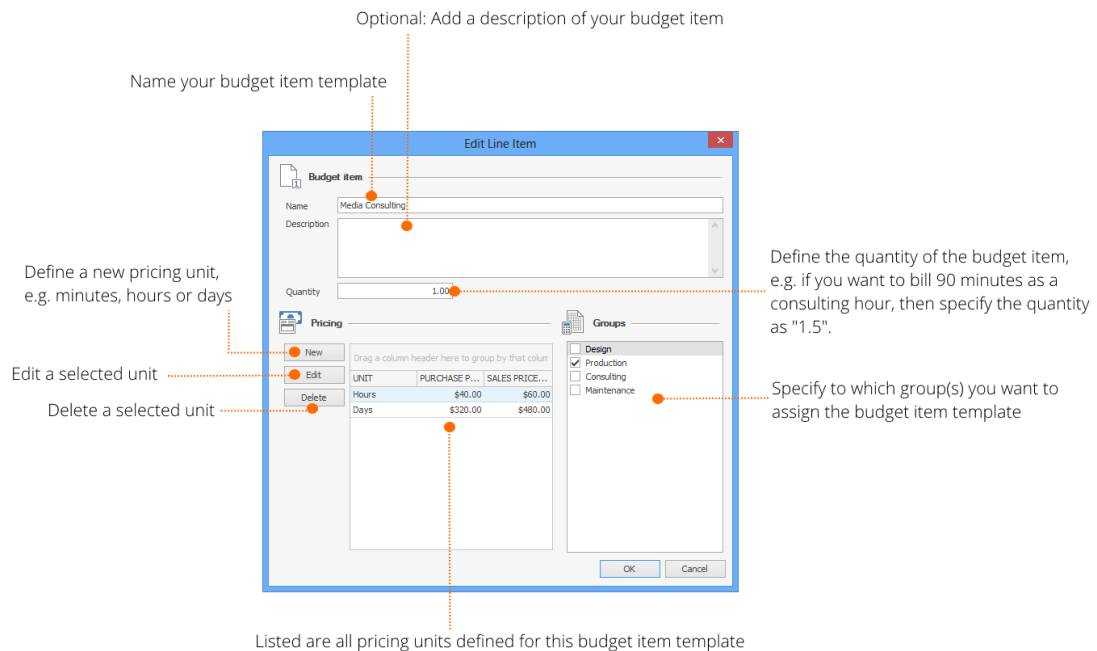
Budget items

Creating budget item templates allows you to use the template if you want to bill the same activity again. This will save you time as you won't have to create a new budget item.



To create a new budget item template follow these steps:

1. Go to InLoox Options and then in the panel on the left navigate to **Budgets >> Templates >> Budget Items**
2. Click on New to create a new budget item template.
3. You can edit the information of your new budget item template in the new dialog window:



- Section **Budget Item**

- *Name and Description* – Give your budget item a clearly distinguishable name so you will be able to identify it easily later on. Add a description with additional comments or information if necessary.
- *Quantity* - Define the quantity of an item, e.g. if you want to bill 90 minutes as a consulting hour, then specify "1.5".

- Section **Pricing**

- Defining the *purchase and sales prices* for the budget item enables you to save time as this information will be filled in automatically when you create a new budget item from a template. You can create, edit or delete already defined pricing units.

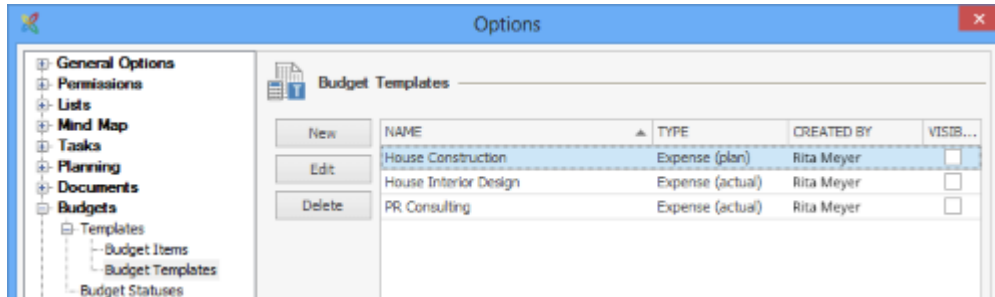
- Section **Groups**

- Specify to which *groups* you want to assign the budget item template. You can choose more than one. It's important to choose at least one group, otherwise you won't see the template when you create a new budget item in Budgets.

4. Click **OK** to save your new budget item template.

Budget templates

You can create templates of a complete budget including budget items. If you want to create a budget template out of an existing budget, you can do so in the respective Project **Budgets** directly. You can also create a budget template from scratch in the **InLoox Options**. There you can also edit and delete existing budget templates.



Follow the following steps to create a new budget template:

1. Go to the **InLoox Options** and in the folder structure on the left navigate to **Budgets >> Templates >> Budget Templates**
2. Click on **New** to create a new budget template.
3. Edit your template in the new dialog window:

Choose between the 4 budget types:

Expense (plan)
Expense (actual)
Revenue (plan)
Revenue (actual)

By default, the budget is only visible to yourself, but you can mark it as visible for all users

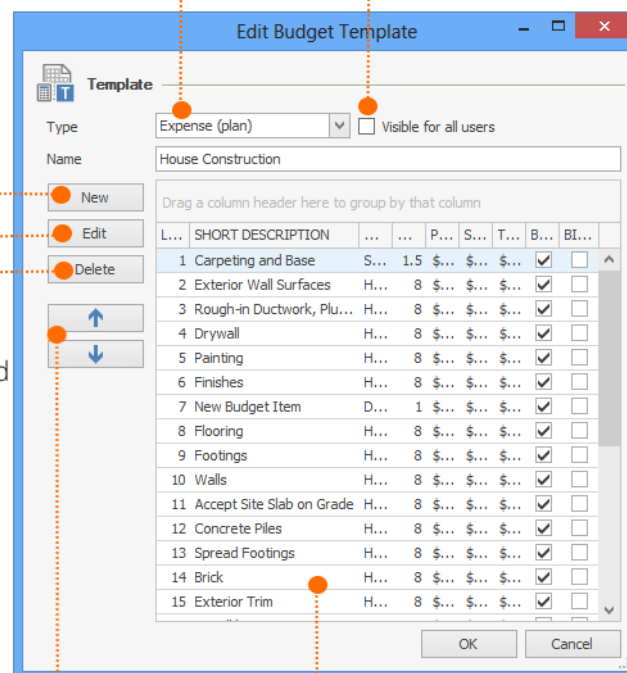
Create a new budget item for the budget template

Edit a selected budget item

Delete a selected budget item

Change the order of the budget items in the list

List of all budget items in the budget template

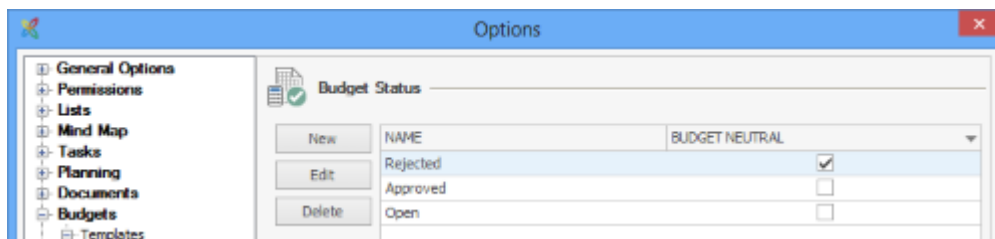


- **Type** – Choose between the four budget types Expense (plan), Expense (actual), Revenue (plan) and Revenue (actual)
- **Visible for all users** – By default, the budget is only visible to yourself, but you can mark it as visible for all users.
- **Name** – Give your budget template a clearly distinguishable name so you and your team members can easily find it later.
- **New** - To create a new budget item click on New. A window will open in which you can edit the information of your budget item
- **Edit and Delete** - Mark the budget item which you want to edit or delete, and click on Edit or Delete respectively.
- **Order of budget items** - Change the order of the budget items in the list by marking a budget item and move it up or down by clicking on the arrows.

4. Click on **OK** to save your new budget template.

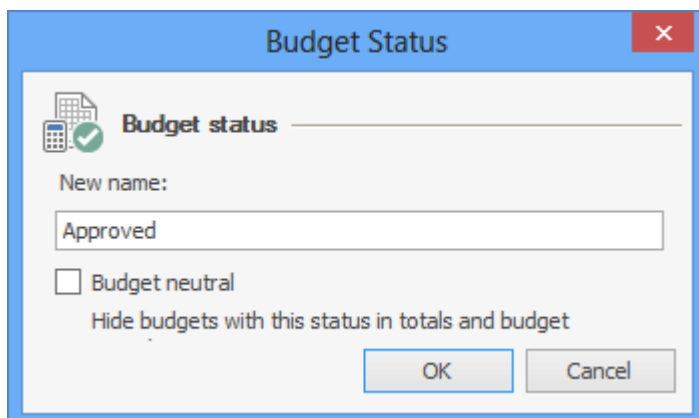
Manage the budget statuses

The standard statuses that are in the **InLoox Options** by default are *Rejected*, *Approved* and *Open*. You can also create individual budget statuses, or edit and delete the existing ones.



Follow these steps to create a new budget status:

1. In Outlook, click on **File** in the upper left hand corner and click on **InLoox Options**.
2. Navigate to **Budgets >> Budget status** in the folder structure.
3. Click on **New** to create a new budget status.
4. Edit your new budget status in the dialog window. You can also decide whether budgets with that status are budget neutral or budget relevant.



5. Click on **OK** to save your new budget status.

Change the language of InLoox

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 the operation of InLoox at any time without the need to restart.

Proceed as follows to change the operating language of InLoox:

1. We start from the Outlook inbox.
2. Click on **File** and afterwards on **InLoox PM** options or **InLoox now** options.
3. In the tree structure on the left of the InLoox options and select **User Settings** and **Language**.
4. Now you can switch the operating language (Auto, English, German, French, Italian, Spanish).
5. To save your changes click on **Apply**. Now you can close the InLoox options, the operating language will be changed immediately without a re-start of Microsoft Outlook.

Change the number format

Within the InLoox options in the area **Project Number** and **Customer Number** you can define the format rules for project numbers and customer numbers. Please note the following possible effects of changing the format settings:

- New projects/customers are created automatically with the new number format.
- Existing projects/customers retain their old numbers.
- Once assigned sequence numbers cannot be used again.

Format rules

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 COUNT characters. COUNT 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 are not allowed.
\W	Single special character. (A-Z, a-z) or numeric (0-9) are not allowed.

Character	Data type and significance
-----------	----------------------------

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}SEPERATOR\D{2}	right: !!SEPERATOR12, 12SEPERATOR12, abSEPERATOR!? wrong: !!TRENnab, 12SEPERATORab, abSEPERATOR12

Create an InLoox PM user account

To logon to the InLoox PM project management platform you can use Windows or InLoox PM Authentication. With an InLoox PM Authentication, external team members, project partners or stakeholder without their own Windows user account in the corporate network are able to log into InLoox PM directly with user name and password.

IMPORTANT Only users with administrative permissions can create an InLoox PM account.

InLoox PM authentication

Please follow these steps to create an InLoox PM account:

1. Activate first the **InLoox PM contact management**.

TIP For more information, see Activate the contact management.

2. Create a new contact in the **InLoox PM Contacts**.

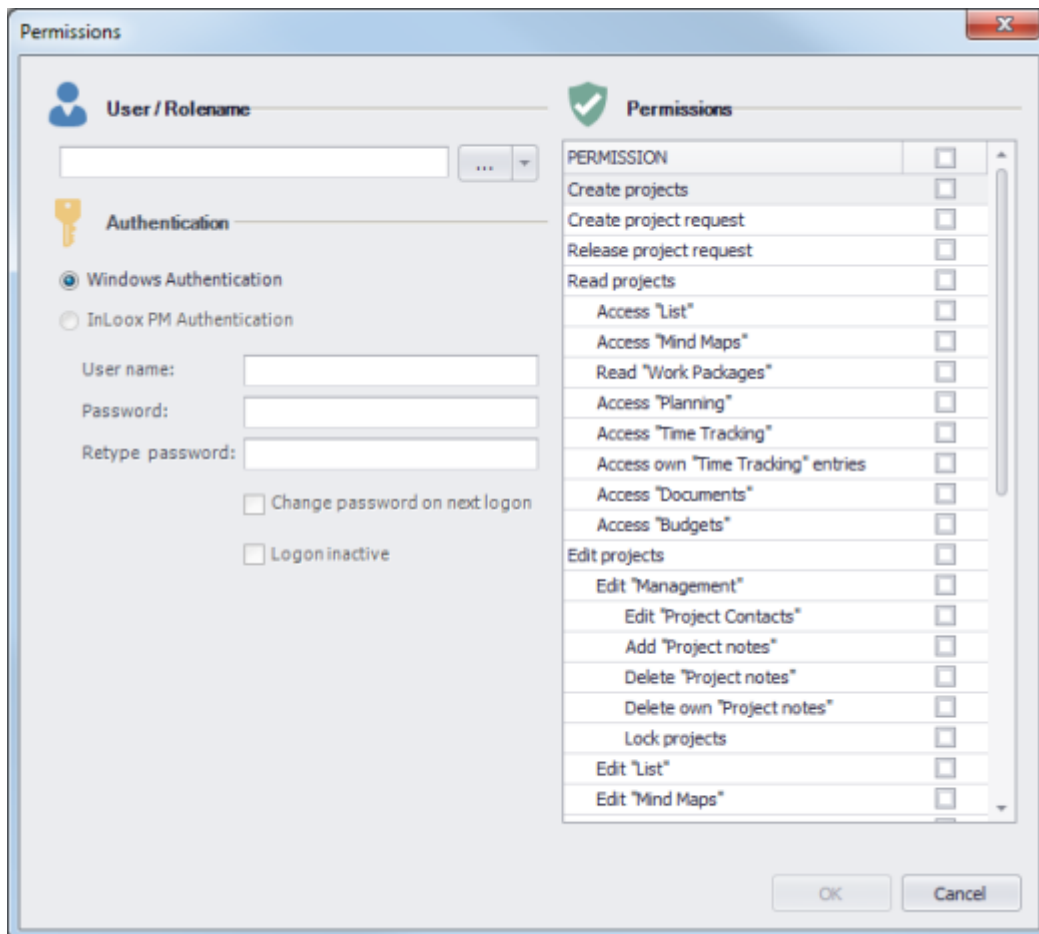
TIP For more information, see Add a contact.

3. Open the **InLoox PM Options** dialog box.


TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.

4. Under **Permissions** click **Permissions**.

5. In the **User-based permissions** section, click **New**.



6. In the **Permissions** dialog box, please follow these steps:

1. Click the **Arrow**  and choose from the drop-down list **InLoox PM user**.
2. In the **Select Contact** dialog box, select **InLoox PM address book** from the drop-down list **Address book**. Choose a name from the list and click **OK**. The contact name is now displayed in the **User name box**, in the **Authentication** section, under **InLoox PM Authentication**.
3. You can change the name in the **User name** field.
4. In the **Password** field, type a new password for the InLoox PM authentication.
5. Enter this password again in the **Retype password** box to confirm it.

6. Activate one of the following check boxes:
 - Activate the **Change the password on the next logon** check box to allow the InLoox PM user to change his or her password. See Change InLoox PM password below.
 - Activate the **Logon inactive** check box to deactivate the authentication.
 7. Select the permissions from the **Permissions** list for the InLoox PM user.
 8. Click **OK**.
7. Click **OK** or **Apply** to save the changes.
- TIP** Now, the InLoox PM user can logon to InLoox PM. For more information see Log on as InLoox PM user.

Change the InLoox PM password

Please follow these steps to change the InLoox PM password

1. Open the **InLoox PM Options**.

TIP For more information on how to open the InLoox PM options, see Open the InLoox PM options.
2. Under **User settings** click **User Login**.
3. In the **User Login** section, choose **InLoox PM Authentication** and click the **Change Password** button.

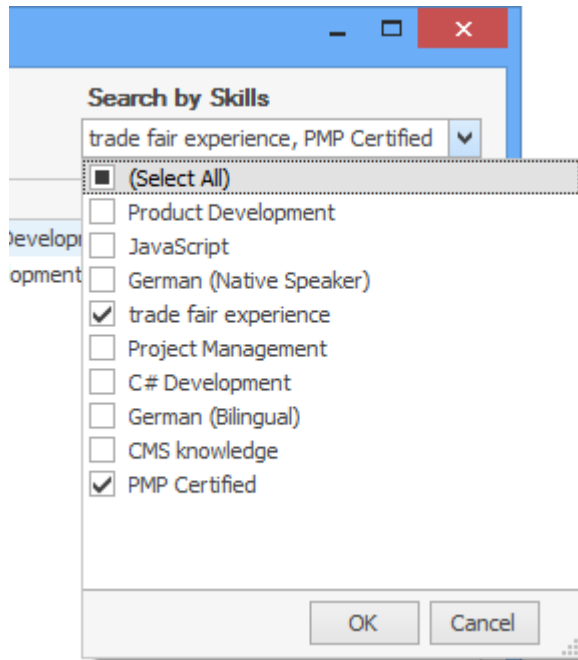
You can also change your user name in the **User name** field.
4. In the **InLoox PM Authentication** dialog box, type your current password in the **Current password** field.
5. Type the new password in the **Password** field.
6. Type the new password again in the **Retype new password** field.
7. Click **OK**.

Now, you can use your new password for the InLoox PM Authentication.

TIP For more information on how to log on, see [Log on as](#) InLoox PM user.

Create and Assign Skills

Define the skills of your team members in InLoox, such as language skills, special industry knowledge or certifications. This enables you to easily identify employees with the required skills inside your company, contact them directly and accurately allocate them according to their skills.



You can create, edit and delete skills in the InLoox Options, as well as assign or re-assign these skills to the respective resources.

Skills

New

Edit

Delete

NAME	DESCRIPTION
C# Development	
CMS	
German (Native Speaker/Bilingual)	
Photoshop	
PMP Certified	
Project Management Agile	
Projekt Management Traditional	
Relational Databases	
Trade Fair Experience	

Assignment

New

Edit

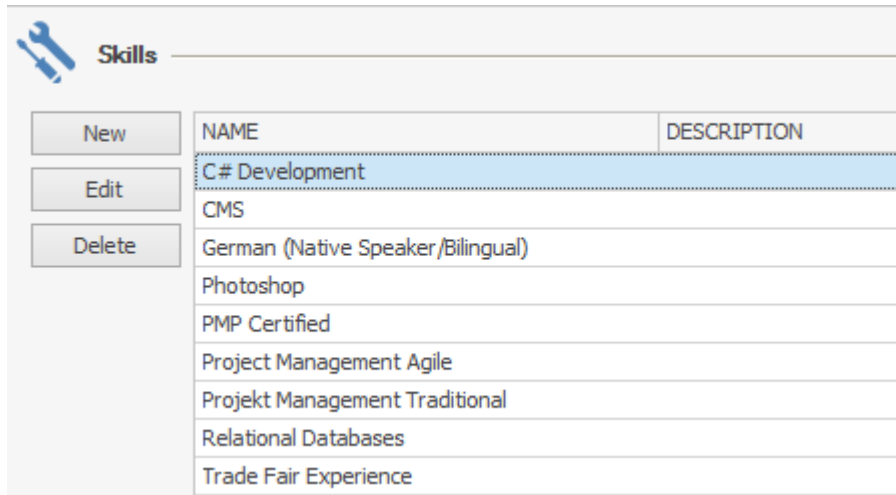
Delete

RESOURCE	SKILLS
Patricia Peters	German (Native Speaker/...
Rita Meyer	Photoshop; Project Manag...
Frank Foster	Project Management Agile

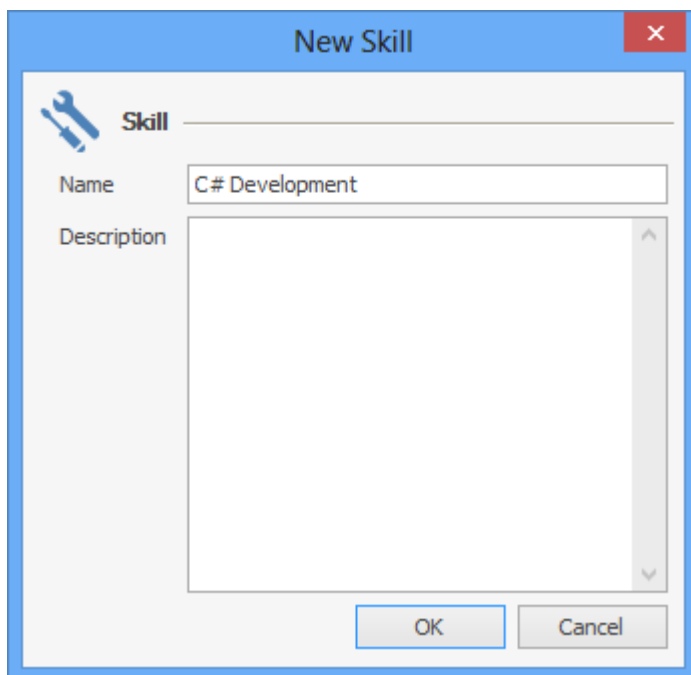
Create a new skill

Follow these steps to create a new skill:

1. Navigate to **File >> InLoox Options >> Contacts >> Skills**



2. Click on **New** to create a new skill.
3. A new editing dialog opens in which you can give the new skill a name and add a description.

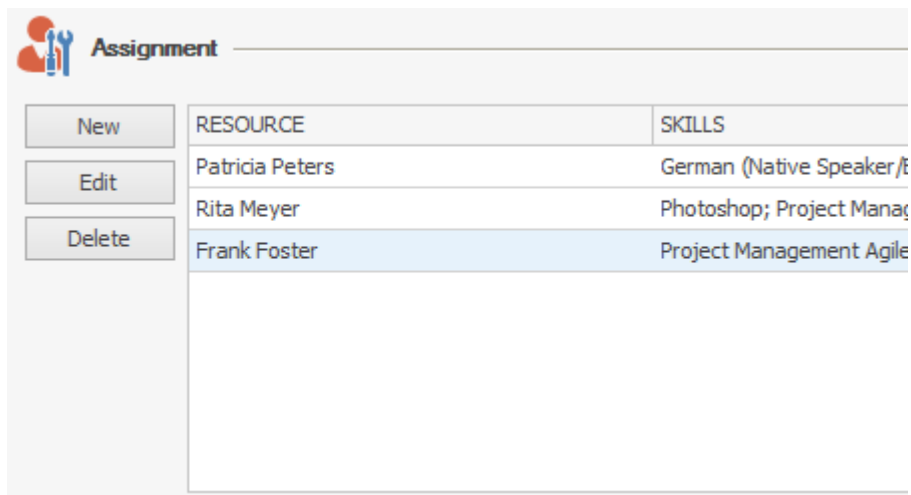


4. Confirm with **OK**.

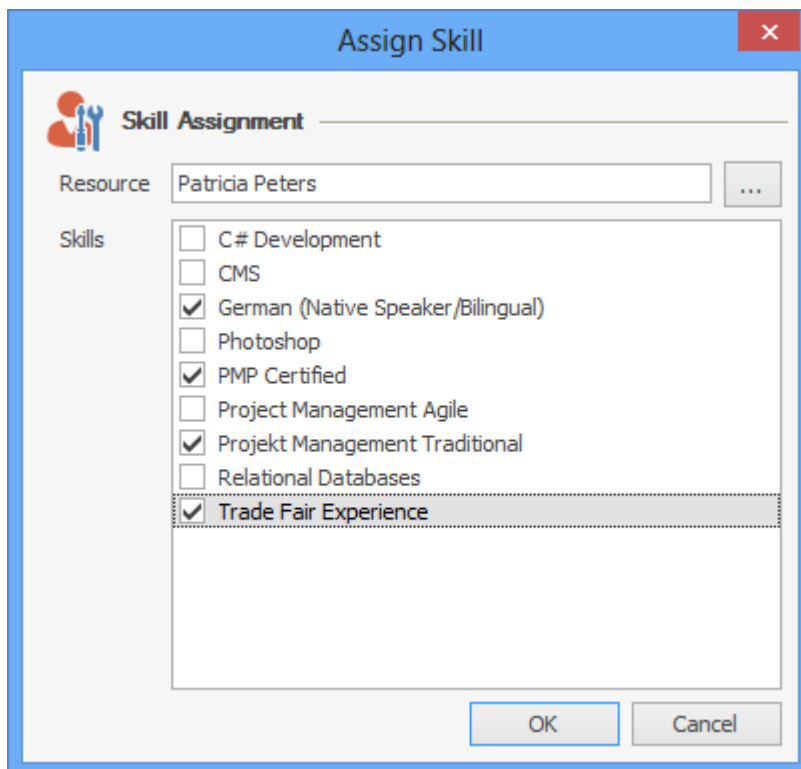
Assign a skill to a resource

Follow these steps to assign one or more skills to a resource:

1. Navigate to **File >> InLoox Options >> Contacts >> Assignment**



2. Click on **New** to assign skills to a resource
3. A new editing dialog opens. Click on [...] to open the address book. Choose the contact you want to assign skills to. Confirm your choice with **OK**.
4. Select all skills you want to assign to the contact.



Create and edit groups

Groups are a good way to sort tasks and budget items into specific categories with pre-defined purchasing and sales prices. This enables you to keep an overview of your expenses and revenues

across different groups, i.e. types of work or services (see [Budget Overview](#)). It's important to create distinct groups that cover distinct activities, such as Production, Design, Maintenance, or Consulting.

The automatically created budgets **Expenses (Plan, Resources)** and **Expenses (Actual, Time Tracking)** use the purchase and sales prices specified for each group to bill a task.

You can add, edit and delete groups in the InLoox Options. To get there navigate to the **InLoox Options >> General Options >> Groups**.

Options

Groups

NAME	PURCHASE PRICE	SALES P
Design		\$40.00
Production		\$40.00
Consulting		\$40.00

All groups, including their purchase and sales prices, are shown. Pricing calculations will be based on these prices.

Currency

Symbol \$

Annotations:

- Add a new group (points to New button)
- Edit an existing group (points to Edit button)
- Delete a selected group (points to Delete button)
- Change the order in which groups are being displayed (points to arrow buttons)
- Change the currency symbol (points to \$ symbol)

Creating a new group

To create a new group, take the following steps:

1. Go to **InLoox Options** and navigate to **General Options >> Groups**
2. Click on **New** and an edit window will open

3. Edit the group information

- **Name** - Give your group a clearly distinguishable name. This will make it easier to assign your budget items to the right group.
- **Purchase and Sales price** – Define the standard purchase and sales price for the group

4. Click **OK** to confirm

Important Effects of creating, editing or deleting a group, or changing the currency:

- Creating a new group **does not affect** your existing budget items and tasks.
- The purchase and sales prices of your existing budget items will remain the same, even if you edit the purchase and sales prices of a group. The pricing will automatically change to **Custom** when you change the prices for a group in the InLoox Options. If you want to apply the newly defined prices, select **Standard**.


Already billed expenses from time tracking entries **will not change** when you edit purchase and sales prices.

- If you delete a group, all tasks and budget items that have been assigned to this group will automatically be assigned to another group. You will have to re-assign these tasks to the appropriate group.
- Changing the currency symbol does not automatically convert prices. Prices in InLoox will remain the same ("currency rate" = 1:1), and only the currency symbol changes.

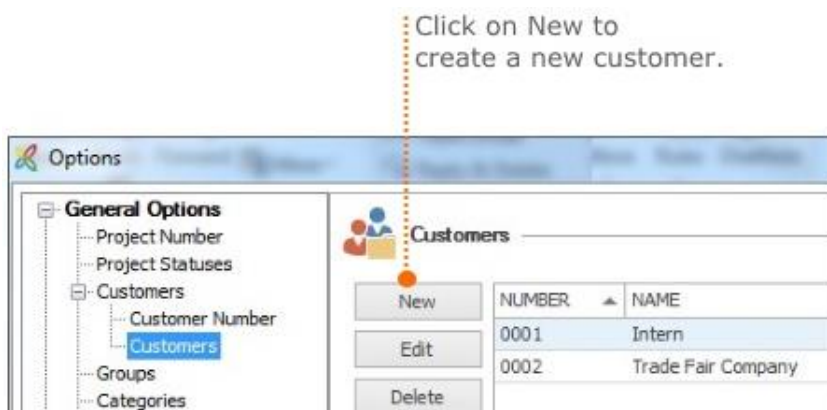
Create and manage customers

The InLoox options support you with a central customer management. You can create a new customer system-wide within the options as well as directly within a project.

Create a new customer

1. Open the InLoox options by clicking on **File** in the upper left corner. Afterwards click on the InLoox options button  Options

2. Select **General Options** and click on **Customer** then on **Customers**.



3. To save your changes click on **OK** or **Apply**.


Edit and delete already existing customer

- Choose a customer and click on **Edit** to customize the chosen customer.
- Click on **Delete** to remove a chosen customer from the customer list.

Effects of editing or deleting a customer

- The renaming of a customer immediately affects all relevant projects.
- The deletion of a customer immediately affects all relevant projects.

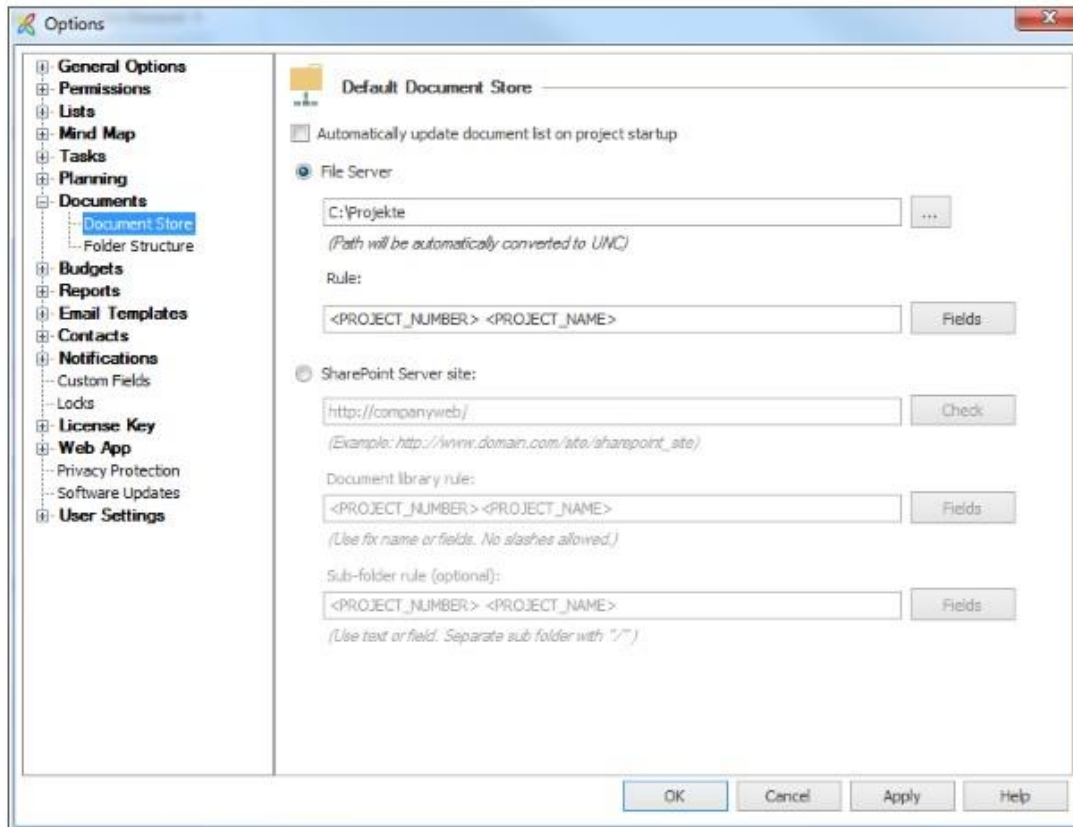
Documents

If you are the admin, you can edit the settings for the document folder path and the document folder structure in the InLoox Options . As of InLoox version 9.0.12 admins can also set rules for the creation of document folders.

Change the document folder path

In the InLoox PM options you can define the rules for the document storage feature. To change the document folder path in the InLoox options, proceed as follows:

1. Open the InLoox PM options by clicking on **File** and afterwards directly below **InLoox PM** on options.
2. The dialog box **Options** opens. Click on **Documents** on the right side of the box and afterwards on **Document Store**.



3. Select the **Automatically update document list on project startup** check box to automatically refresh the document list when opening a project. This feature slows down the opening progress of a project, but ensures that the document list displays the latest status of the document folder.

4. Choose between File Server and SharePoint Server site as default document store.

4.1 When you manage your documents on your own computer or on a file server, choose **File Server**.

Afterwards click on  to select a folder and then click on **OK**.

- In the **Rules** field you can define the folder structure. To define a rule you can use the following fields: Project Name, Project Number, Company Name, Company Number, and Division.
- The default setting for the rule <PROJECT_NUMBER><PROJECT_NAME> leads to the following folder structure: <BASEPATH>\2016-001 Project 1

4.2 When you manage your documents on a SharePoint server, choose **SharePoint Server site**.

- Enter the path to your SharePoint server, like `http://company/web` or `Http://www.my-sharepoint.com/site_intern/`, in the first field.
- **Document library rule and Sub-folder rule (optional)**: Here you can define the structure for the SharePoint document library and – if needed – for sub-folders. You can enter any text (and use one library for all projects) or use fields to define a rule (see Rules in the file server section). The advantage of using a rule and creating one document library for every project is that you can individually control the access permissions of the different project libraries.

Effects of changing the storage type, base path or rules:

- If there haven't been any projects yet, changing the settings has no effects. New projects will be created on base of the new settings.
- If you have existing projects and you change the settings, all **new** projects will be created on base of the changed settings. All existing projects will be continued with the former settings, unless you change it manually in the project.

Edit the document folder structure

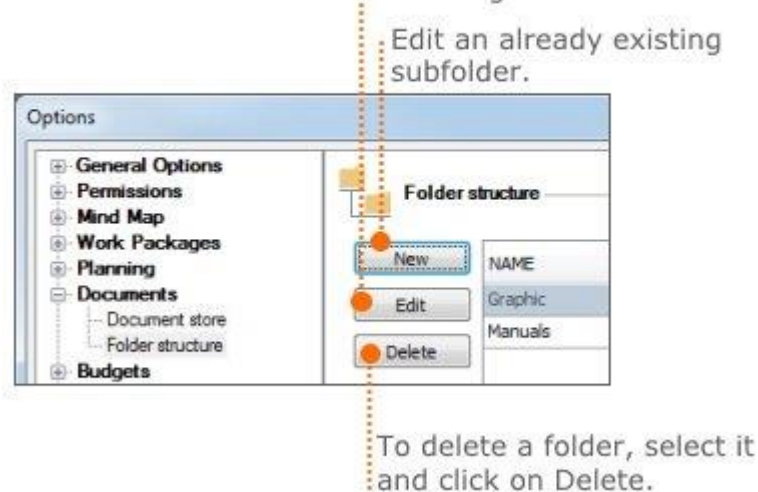
The InLoox PM options allow you to individually define the folder structure for the document area. Thereby, you can automatically create subfolders in every document folder. You can create as many subfolders as needed.

For example, when you create a new subfolder (e.g. marketing) in the InLoox PM options. This new subfolder is created in every project document folder.

How to create a new subfolder

1. Open the InLoox PM options by clicking on **File** in the left corner. Afterwards click on **Options** below InLoox PM in the side panel.
2. Click on **Documents** and then on **Folder structure**. On the right side you will see the Folder structure area.

Click on New to create a new subfolder. Enter the name of the subfolder in the dialog box and click OK.



3. Click on **OK** or **Apply**, to save your changes.

WARNING Effects of changing the document folder structure:

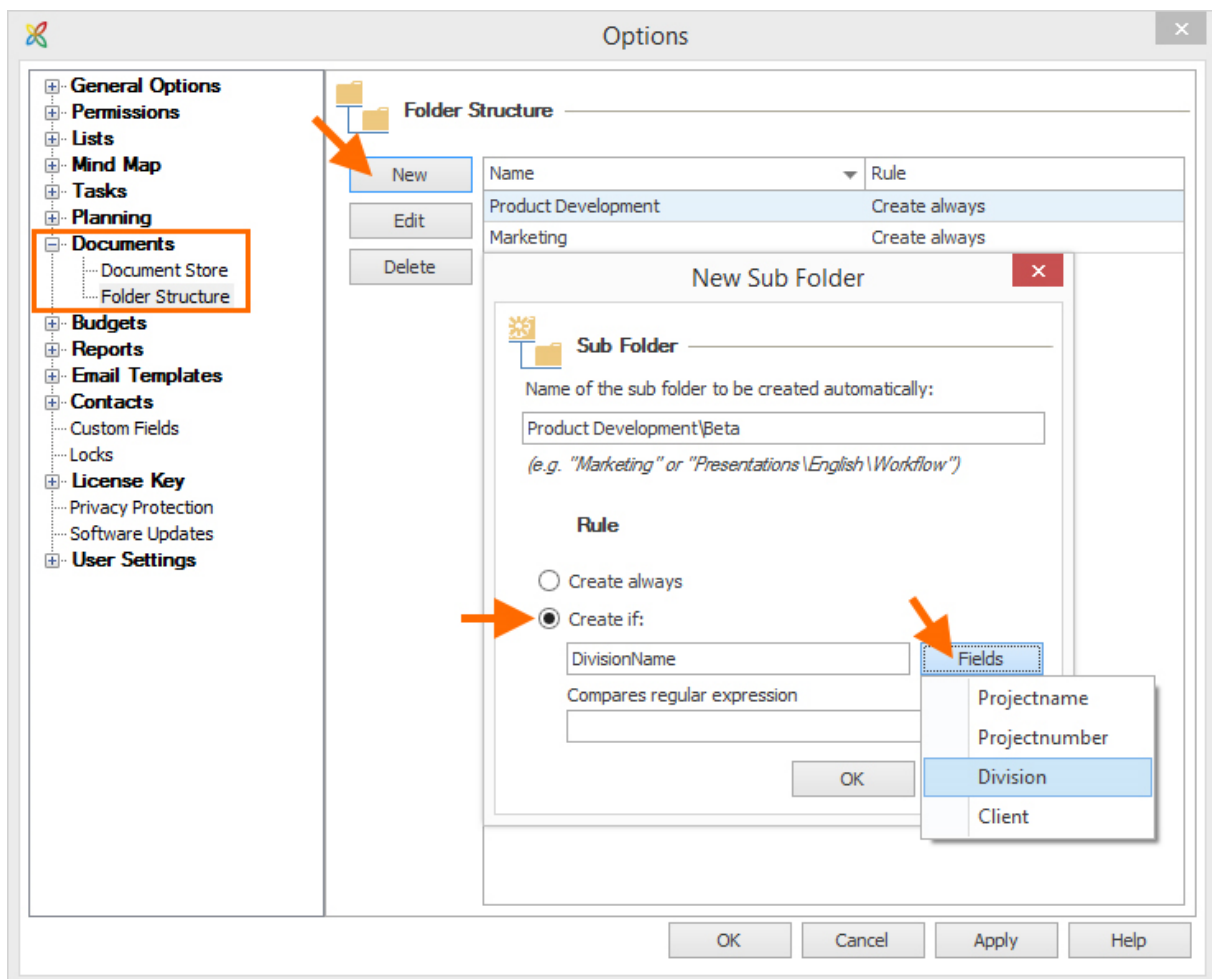
- Existing subfolders are not deleted or renamed, when the subfolder structure is changed.
- The new structure is applied to already existing projects, when new documents are added.

Set rules for document folder structure

In order to use this feature, you have to download InLoox version 9.0.12 or higher.

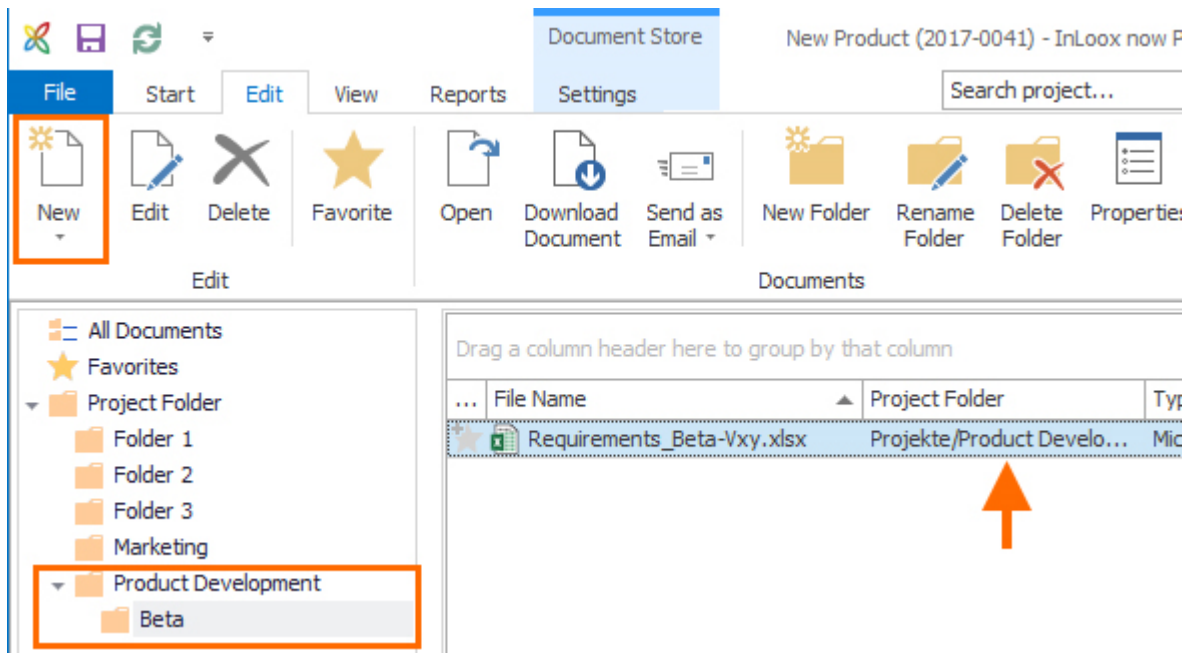
1. In Outlook, click on **File** and open the **InLoox Options**.
2. In the side panel, click on **Documents** and then on **Folder structure**.
3. Click on **New** to create a new folder.
4. If you want to set a rule for this folder, activate **Create if**.
5. Click on **Fields**, to select which field needs to have a certain value. Select, e.g., **Division**.

In this example, we want to create the subfolder “Product Development\Beta” only if it is a project of the division IT-Beta Team.



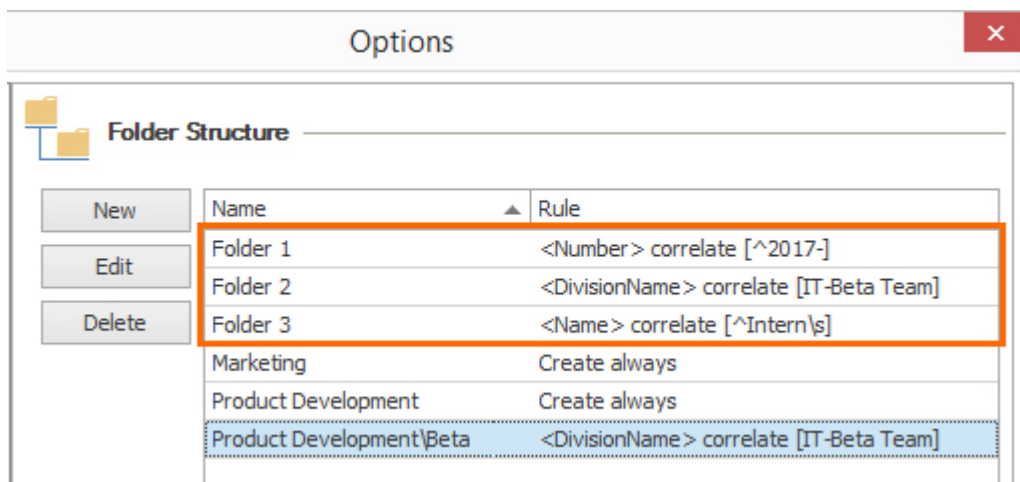
IMPORTANT The regular expression must exactly match the value used in the field. If the division is called “IT-Beta Team”, the rule will not apply if you enter „it-beta team“.

If you create a new project and click on **New** in the **Documents** section, the new folder structure is automatically created based on the newly set rules.



Regular expressions for more complex rules

If you are familiar with regular expressions, you can use them to set more complex rules. Here are some examples:



- Folder 1 is only created if the project number starts with „2017-„ (the year followed by a minus).
- Folder 2 is only created if the division „IT-Team Beta“ is selected for the project.
- Folder 3 is only created if the project name starts with the letters „Intern“ followed by a space (e.g. „Intern digitalization project“ or „Intern revision 2016“).

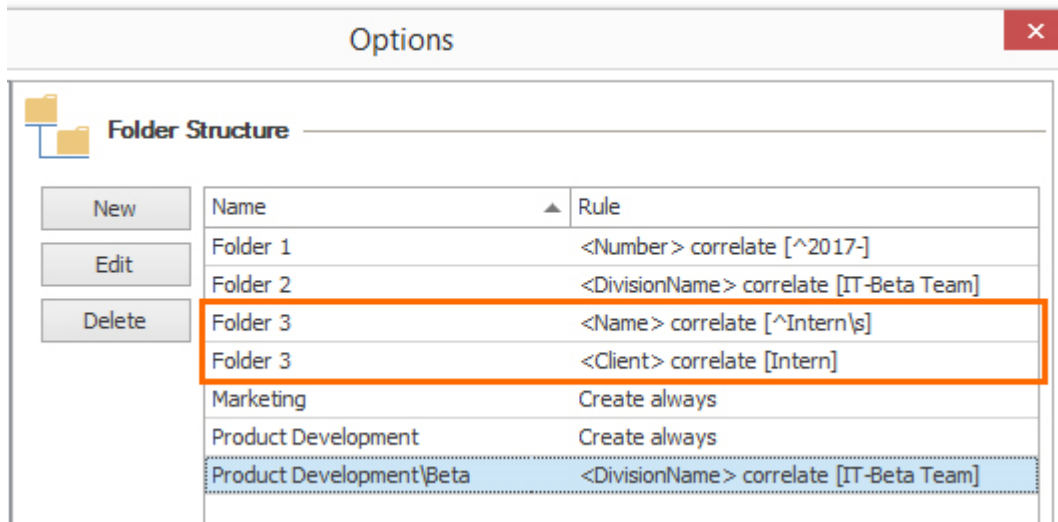
PLEASE NOTE New rules are not applied to existing projects. They only apply for newly created projects.

PLEASE NOTE If a value for the regular expression does not exist, InLoox warns you with an x next to the field. The value for the regular expression must exactly match the value used in the field.

OR-rules for a document folder

You can set several OR-rules for one folder. Simply create each rule for the same folder. InLoox will then create the folder if one of the rules applies.

In this example, the Folder 3 will be created if the project name is „Intern“ followed by a space or if the customer in the project is „Intern“.



PLEASE NOTE You cannot create AND-rules.

Edit or delete rules

If you want to edit a rule, mark it and click on **Edit** or double-click on the rule. Now you can change the values for the rule. Click on **Apply** or click on **OK** to apply the changes and close the InLoox Options.

If you want to delete a rule, mark the rule and click on **Delete**. InLoox will ask you, if you really want to delete the rule. Confirm by clicking on **Yes**.

PLEASE NOTE If you delete a rule, this will not affect existing folder structures. The rule will only no longer be applied for newly created project document folders.

Edit the project statuses

The status defines different project conditions and degrees of completion. You can edit the status of a project on the **Management** page.

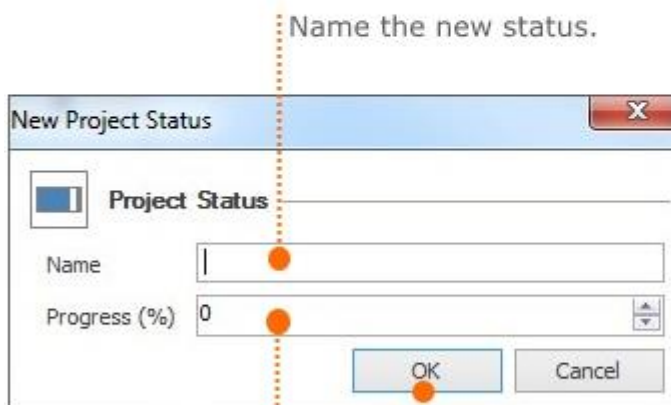
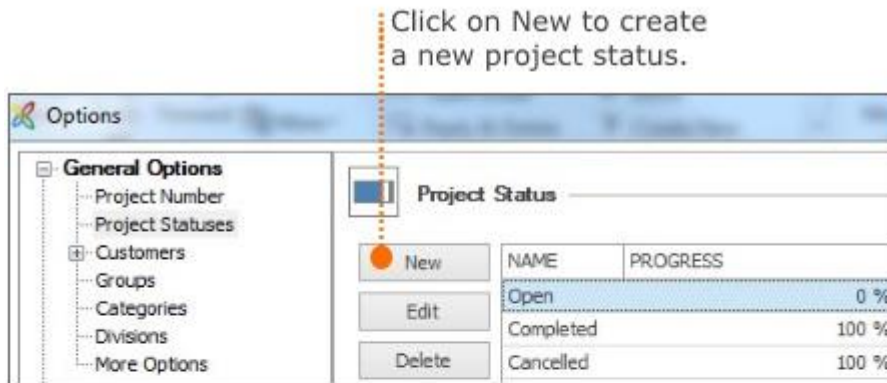
In the InLoox options you can define as many project statuses as needed. Each status is connected to the project progress as a percentage.

Create a new project status

1. Open the InLoox options by clicking on **File** in the upper left corner. Afterwards click on the InLoox options button

Options

2. Select **General Options** and click on **Project Statuses**.



Select a corresponding progress in %.

To create the category click on OK.

3. To save your changes click on **OK** or **Apply**.

Edit and delete already existing statuses

- Choose a status from the list and click on **Edit** to customize the chosen status.
- Click on **Delete** to remove a chosen status from the project status list.

Effects of creating, editing and deleting a project status

- Adding a new status won't affect existing projects.
- Changing the sequence in the status list has no effects on existing projects.
- Editing a status (e.g. name, progress in %) immediately affects all relevant projects.

- Deleting a status affects all projects that used it. Those stay without a status until the user manually chooses another status in the project.

Lock and unlock project access

InLoox enables you to lock a project if you want to avoid further changes to a project. You can delete a project lock anytime. To be able to lock a project or to delete a project lock you have to have the permission to **Lock projects**.

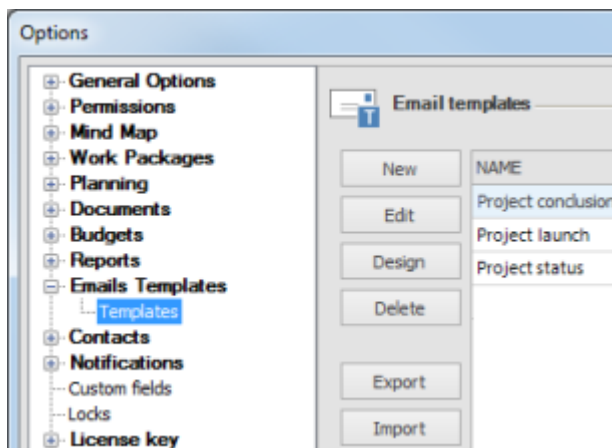
Please follow these steps to lock a project:

1. Open an existing project or create a new one.
TIP For more information on how to create a project see Create a project.
2. On the **Management** page, on the **Edit** tab, in the **Status** group, click **Lock project**.
3. On the **Start** tab in the **Actions** group click **Save and close**.

Manage e-mail templates

InLoox offers four different default e-mail templates (project request, project launch, project status and project conclusion). Those default templates can be edited by an InLoox admin in the InLoox options. The admin can also create individual templates (administrator permission needed!).

1. Click on File and then on InLoox Now Options or InLoox PM Options to open the InLoox options.
2. A new window will open. In the navigation area on the left click on Email Templates >> Templates. An overview to the already existing templates will open.



In the overview you can (1) create a new e-mail template, (2) edit existing templates, (3) design e-mail templates, (4) delete existing templates, (5) export templates or (6) import templates.

(1) Create a new e-mail template

1. To create a new e-mail template click on New.
2. A new window will open. Here you can add information about the new template:

- Name the e-mail template.
- Define rules for the e-mail fields Recipient, CC Recipient, BCC Recipient and Subject. Therefore, click on Fields and select a field from the dropdown-list like PROJECT_MANAGER.

3. Afterwards click on OK to close the dialogue and save the new template.

4. Now a new window will open (InLoox Report Designer), where you can edit the template individually. How to work with the InLoox Report Designer is explained in the chapter The InLoox Report Designer (The InLoox Report designer features are restricted for e-mail templates and not as extensive as for InLoox reports). When you have finished, click on Apply in the InLoox options to save your changes.

(2) Edit e-mail templates

For changing the general details (Name, rules) of an e-mail template select the template from the overview and click on Edit. A new window will open, where you can edit the general settings. When you have finished click on OK to close the window. Back in the InLoox options click on Apply to save your changes.

(3) Design e-mail templates

For changing the content of an already existing e-mail template select the template from the overview and click on Design. A new window will open (InLoox Report Designer), where you can edit the template content individually. How to work with the InLoox Report Designer is explained in the chapter The InLoox Report Designer (The InLoox Report designer features are restricted for e-mail templates and not as extensive as for InLoox reports). When you have finished, click on Apply in the InLoox options to save your changes.

(4) Delete e-mail templates

To permanently delete an e-mail template, select the template from the overview and click on Delete. Afterwards click on Apply in the InLoox options, to save your changes.

(5) Export e-mail templates

For saving e-mail templates on your computer locally, select a template from the overview and click on Export. Afterwards select the storage location and click on Save. When you have finished, click on Apply to save your changes.

(6) Import e-mail templates

For importing e-mail templates that are saved locally on your computer, click on Import. A new window will open where you select the template and click on Open. When you have finished, click on Apply to save your changes.

Manage mind map templates

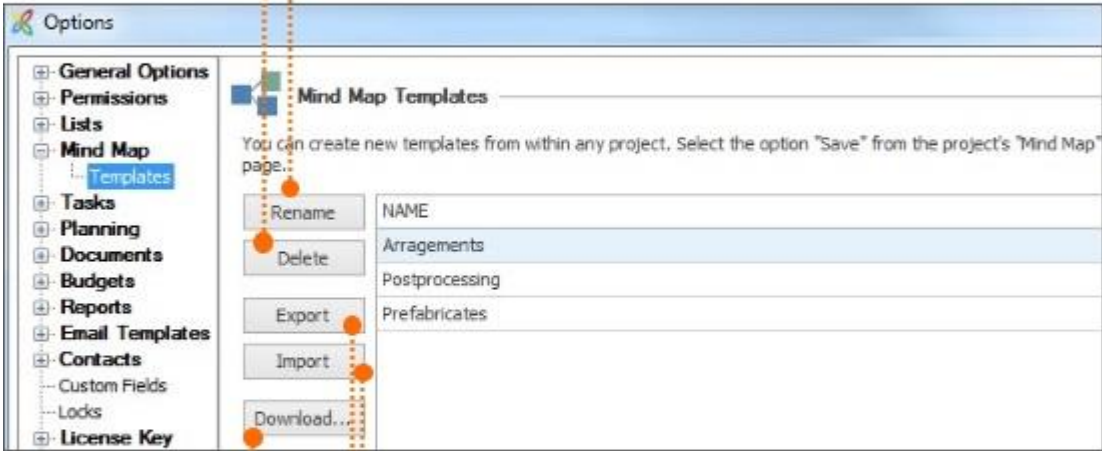
In the InLoox options you can edit mind map templates that you have created in the projects. For managing the mind map templates you need specific user permissions.

TIP For more information on how to create a mind map template see: Export a mind map template

1. Open the InLoox options by clicking on **File** in the upper left corner.
2. Click on **Mind Map** and then click on **Templates**. On the right side you can see the area mind map templates:

Permanently delete a selected template.

Rename a selected mind map template.



Click on Export to save an existing template to your computer. Click on Import to load a mind map template from your computer.

Click on Download to download mind map templates from the InLoox website.

3. Click on **OK** or **Apply** to save your changes in the InLoox options.

Manage notification templates (InLoox PM)

Customize/Design notification templates

You can individually customize the default notification templates. Therefore, you can use several fields. A field can be described as a placeholder for specific project information. You can edit the template by deleting or adding fields.

To customize a template, proceed as follows:

1. Open the InLoox PM options and the notification templates area via the tree structure on the left (**File >> InLoox PM options >> Notifications >> Templates**).
2. Select a template from the overview and click on **Design**, to open the notification designer.
3. In the notification designer on the right, you will see the **list of variables**. Click on **Variables**, to see all available fields.

The following fields are available to customize notification templates:

Field name	Description	Content
DisplayName	Display name	Name of tasks, planning elements, documents and project notes.
Description	Description	Multiple-line description of planning elements.
EndDate	End planning element	End date of the planning element.
Flag	Flag	Highlighting for planning elements (none, green, yellow, red).
GroupName	Group	Indicates the group of the planning element. The group can be a sort criterion or project cost center.
IsProjectEndDateFixed	Fixed deadline project	Specifies whether the project has a fixed completion deadline.
Link	Linked documents	Document paths (text-only) of the planning item.
Location	Location	Free text field. States where the planning element is to be carried out.
PlannerName	Name of planner	The name of the project planner, as stored in Outlook, e.g. Rita Meyer.
Progress	% completed	Completion degree of a planning element in percent. Numeric value between 0 and 100.

Field name	Description	Content
ProjectCategory	Project category	Category to which the project belongs.
ProjectCompany	Project company	Free text field of the customer's name in the project.
ProjectEnd	Project end	End date of the project.
ProjectName	Projekt Name	Short, free description of the project. The project name can be used several times.
ProjectNote	Project name	Multiple-line text for important project information.
ProjectNumber	Project number	Unique number to identify the project.
ProjectPriority	Project priority	Priority of the project.
ProjectStart	Projekt Start	Start of the respective project.
Projectstate	Project status	Specifies the state of project development
PSPCode	PSP code	PSP code = Work Breakdown Structure code. Free text field for identification of phases and milestones in large projects.
ResourceName	Name of resource	The name of the resource or recipient of the message, as stored in Outlook, e.g. Max Schiller.
ResourceList	Resources	List of all involved resources of a planning element, including email address
StartDate	Start planning element	Start date of the planning element.

Field name	Description	Content
WorkAmount	Work amount	Work amount, which is done by the recipient resource of the planning element.

Default notification templates

InLoox PM provides you with various default notification templates that can be managed in the InLoox options (**File >> InLoox PM options >> Notifications >> Templates**).

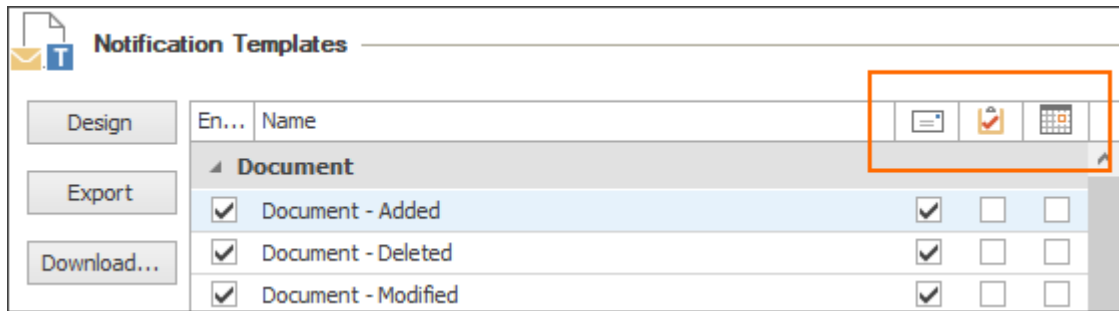
You can use the following InLoox PM default notification templates:

Notification	Purpose
Task - done	InLoox PM sends this notification as soon as a task is marked as done.
Task note - added	This notification is created when a new task note is added to a task.
Task - added	This notification is created when a new task is added to one of the following project areas: Tasks, Mind Map or Planning .
Task - resource added	As soon as a resource is added to a specific task, this notification will be sent.
Task - modified	InLoox PM creates this notification as soon as a task is modified.
Task - resource removed	InLoox informs you when a resource is removed from a task.
Task - deleted	This notification is created as soon as a task is deleted.
Task note - deleted	InLoox PM creates this message as soon as a task note is deleted.
Document - added	InLoox PM informs you about new project documents.
Document - deleted	InLoox PM informs you when a project document is deleted.
Document - modified	This notifications is created to notify about modified documents.
Activity - Predecessor done	You receive this notification when a planning element - that is a predecessor - is marked as done in the project plan.

Notification	Purpose
Activity - added	This notification informs about new activities in project plan.
Activity - done	As soon as an activity is marked as done in the project plan you receive this notification.
Activity - modified	This notifications informs about changes to activities in the project plan.
Activity - deleted	InLoox PM creates this message as soon as an activity is deleted from the project plan.
Milestone - Predessecor done	InLoox PM creates this message when a milestone - that is a predessecor - is marked as completed in the project plan.
Milestone - done	As soon as a milestone is marked as done in the project plan, you receive this notification.
Milestone - added	When new milestones are added to the project plan, this notification is created.
Milestone - modified	This notification informs about modified milestones.
Milestone - deleted	This notification informs about deleted milestones.
Project note - added	This message informs about new project notes.
Project note - removed	You receive this notification as soon as a project note is removed.

Define notification type

Like we have already mentioned in the [introduction chapter](#), you can define for each notification template different notification types. You can choose between: 1 E-Mail, 2 Task-Request and 3 Meeting-Request.



You can choose only one notification type as well as several notification types at the same time:

1 E-Mail

By selecting E-Mail as the notification type, the resource will be notified via e-mail.

2 Task-Request

By selecting Task-Request as the notification type, the resource will receive a task-request as notification.

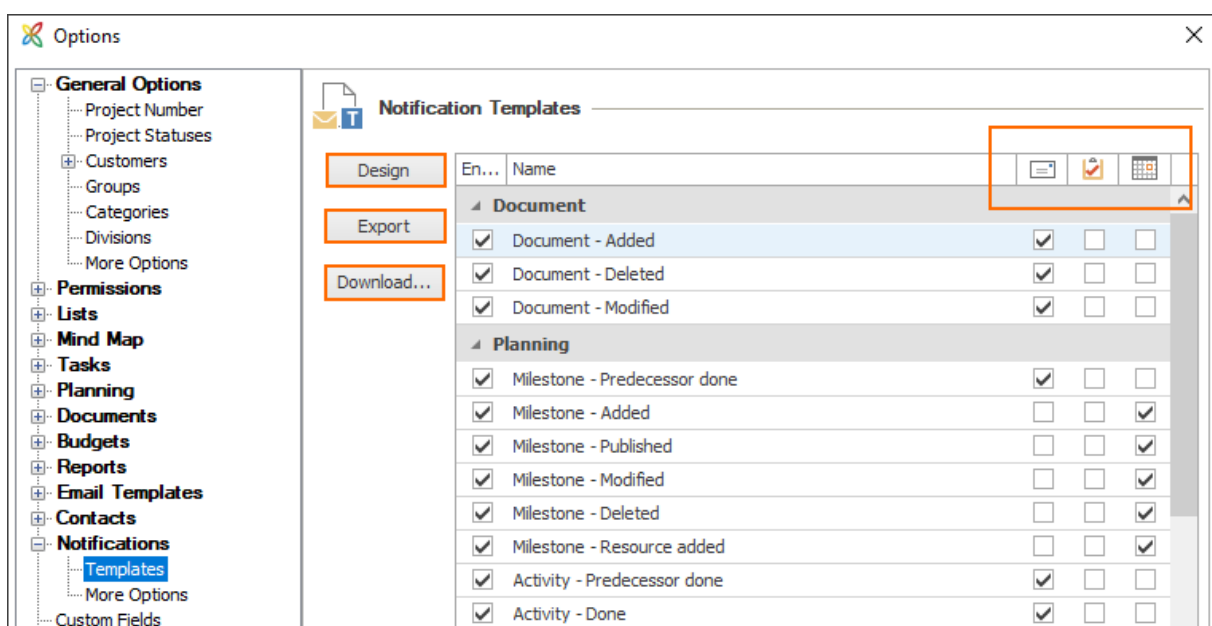
3 Meeting-Request

By selecting Meeting-Request as the notification type, the resource will receive a meeting-request as notification.

Introduction to notification templates

To manage InLoox PM notification templates, open the InLoox options:

1. We start from your Outlook inbox. Click on **File** in the left corner and afterwards on **InLoox PM options**.
2. The InLoox PM options will open in a separate window. In this window select **Notifications >> Templates** in the tree structure on the left, to get to the notification template overview.



3. In the overview you can see all notification templates structured into tasks, documents and planning. Additionally, you can define the notification type for each template by using the three icons on the right side (see screenshot).

4. Furthermore, you have the possibility to design, export and download notification templates:

Design notification templates

To edit the content of an InLoox notification template, select the template from the overview and click on **Design**. A new window will open, where you individually design the template. How to work with the InLoox notification designer, will be explained in the next chapter: [Customize notification templates](#)

When you have finished, save your changes by clicking on **Apply** in the InLoox options.

Export notification templates

To save a notification template locally on your computer, select the template from the overview and click on **Export**. Afterwards select the storage place in the new window and click on **Save**. When you have finished, save your changes by clicking on **Apply** in the InLoox options.

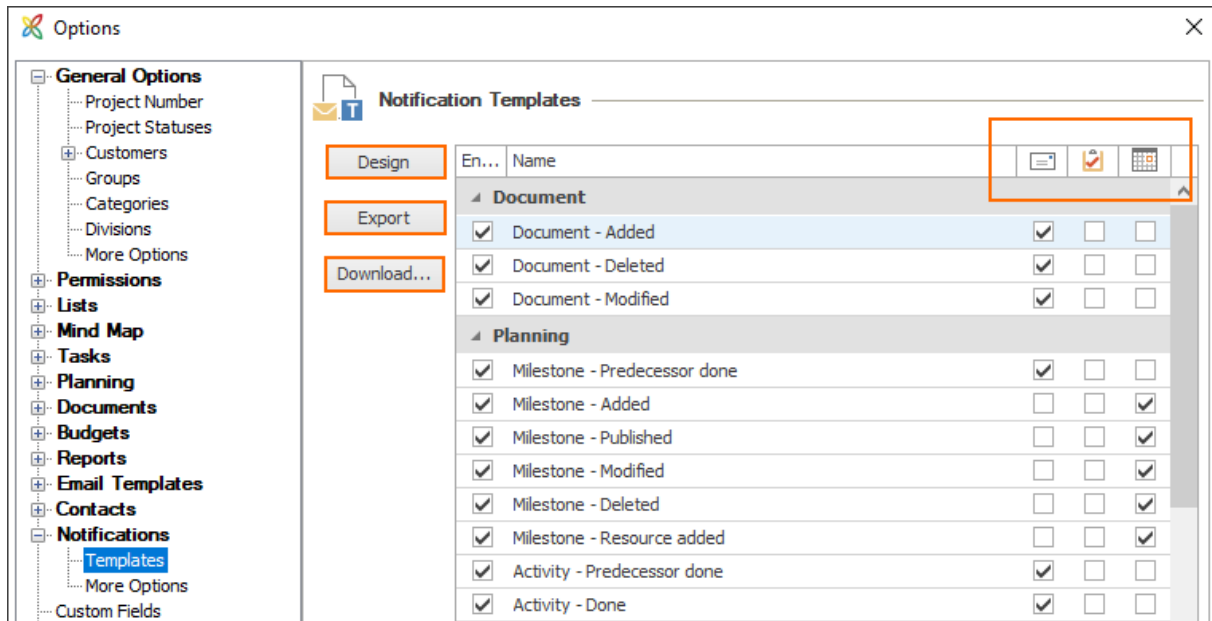
Download notification templates

To download notification templates from the InLoox website, click on **Download**. You will be transferred to the InLoox website, where you select the language (German/English) for your notification templates.

Manage project categories

To manage InLoox PM notification templates, open the InLoox options:

1. We start from your Outlook inbox. Click on **File** in the left corner and afterwards on **InLoox PM options**.
2. The InLoox PM options will open in a separate window. In this window select **Notifications >> Templates** in the tree structure on the left, to get to the notification template overview.



3. In the overview you can see all notification templates structured into tasks, documents and planning. Additionally, you can define the notification type for each template by using the three icons on the right side (see screenshot).

4. Furthermore, you have the possibility to design, export and download notification templates:

Design notification templates

To edit the content of an InLoox notification template, select the template from the overview and click on **Design**. A new window will open, where you individually design the template. How to work with the InLoox notification designer, will be explained in the next chapter: Customize notification templates

When you have finished, save your changes by clicking on **Apply** in the InLoox options.

Export notification templates

To save a notification template locally on your computer, select the template from the overview and click on **Export**. Afterwards select the storage place in the new window and click on **Save**. When you have finished, save your changes by clicking on **Apply** in the InLoox options.

Download notification templates

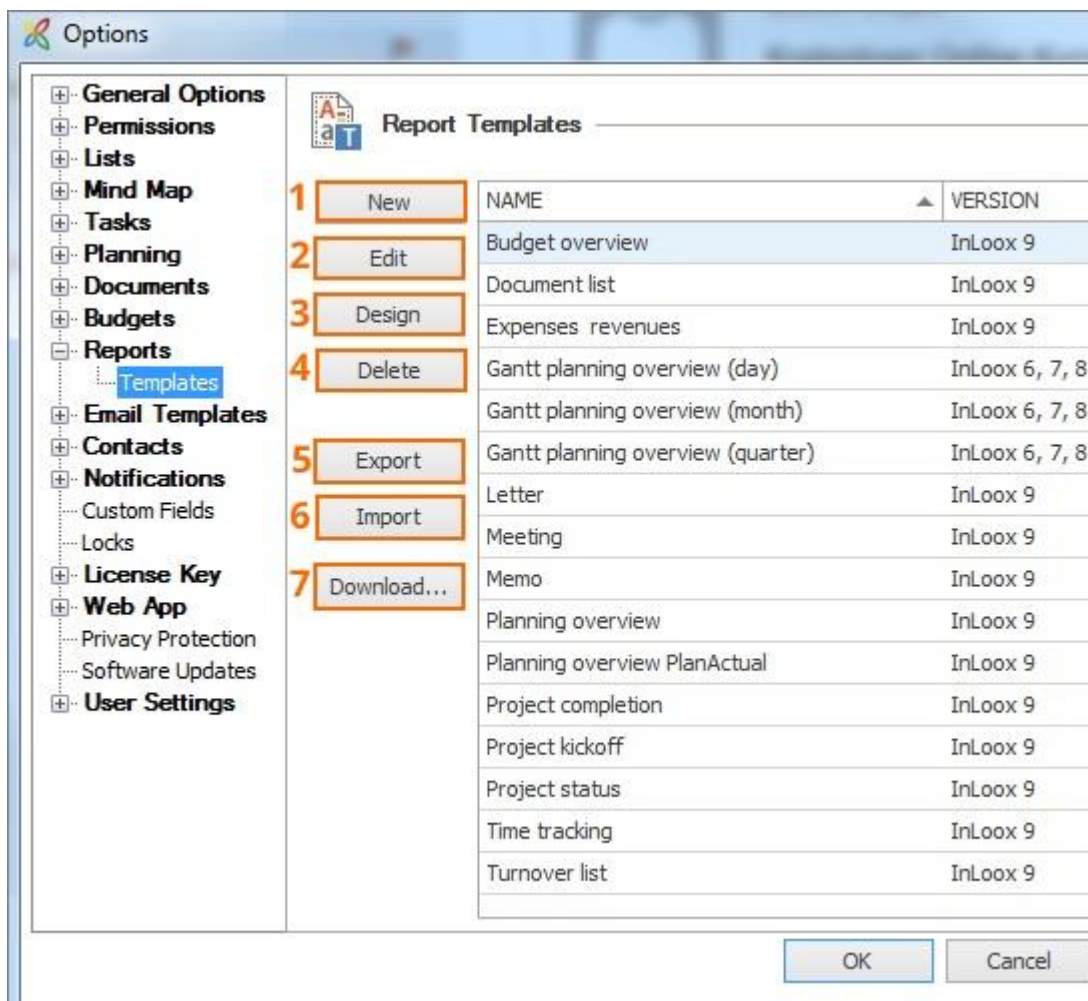
To download notification templates from the InLoox website, click on **Download**. You will be transferred to the InLoox website, where you select the language (German/English) for your notification templates.

Manage report templates

Attention: To administrate report templates you should be InLoox admin or you will need the permission "Create and edit report templates". For more information on user permissions see also "Set user permissions".

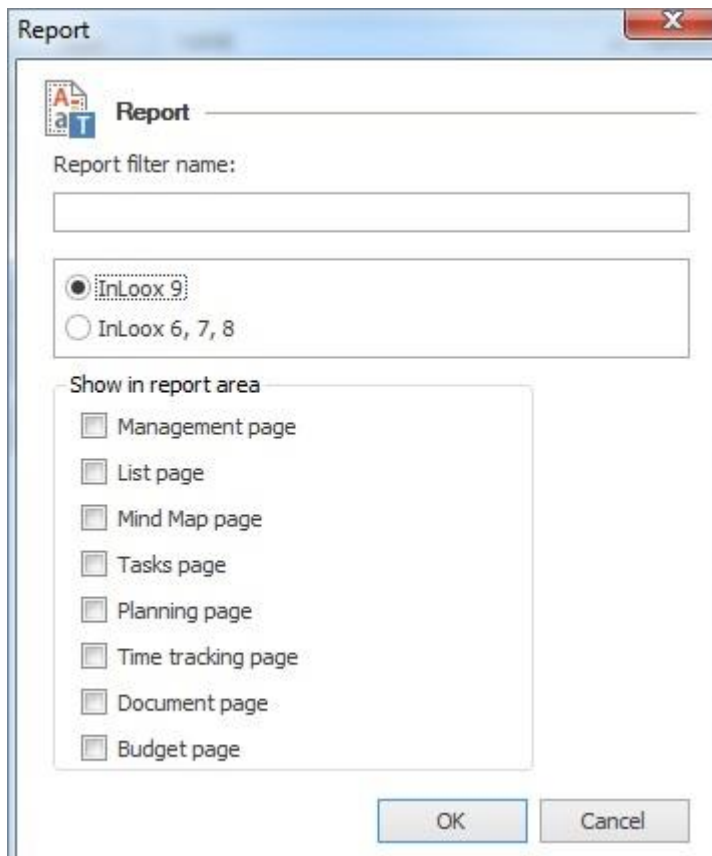
Generally, report templates can be managed in the InLoox options:

1. Open Outlook and click on Home in the upper left corner. Select InLoox PM Options from the list.
2. A new window will open. Select Reports >> Templates on the left side of the window. An overview of the report templates will be shown.



(1) Create a new report template

1. To create a new report template, open the InLoox options and click on Reports >> Templates.
2. Click on New and another window is going to open.



3. In this window you can define all important aspects of the new report:

- Name the report.
- Choose between Inloox 9 and older InLoox versions. InLoox 9 provides you with a new version of the report designer. You can still create and edit reports from InLoox 6, 7, 8 but this is going to change in future InLoox versions.
- Define from which areas of a project you want to have access to this report template.

4. Afterwards click on OK to close the window and to save your settings.

5. Now the report designer is going to open. There you can design the new template individually. For more information on how to use the report designer, see “InLoox report designer”. When you have finished, click on Apply in the InLoox options, to save your changes.

(2) Edit report templates

If you want to change the general settings of a template (like name or visibility), select the template in the overview and click on Edit. A new window is going to open. There you can edit all important settings:

- You can change the name of the template.
- Choose between Inloox 9 and older InLoox versions. InLoox 9 provides you with a new version of the report designer. You can still create and edit reports from InLoox 6, 7, 8 but this is going to change in future InLoox versions.
- Define from which areas of a project you want to have access to this report template.

When you have finished, click on OK and the window is going to close. Back to the InLoox options click on Apply to save your changes.

(3) Design report templates

To change the content of an already existing report template, select the template in the overview and click on Design. The InLoox report designer is going to open. For more information on how to use the report designer, see "InLoox report designer". When you have finished, click on Apply in the InLoox options, to save your changes.

(4) Delete report templates

To delete a report template, select the template in the overview and click on Delete.

(5) Export report templates

To save a report template on your computer, select the template in the overview and click on Export. Afterwards, you can choose the storage location and then click on Save. When you have finished, click on Apply in the InLoox options, to save your changes.

(6) Import report templates

To import a report templates which is saved on your computer, click on Import and select the template from your computer. Afterwards, click on Open. When you have finished, click on Apply in the InLoox options, to save your changes.

(7) Download report templates

On the InLoox website you can download several standard report templates:

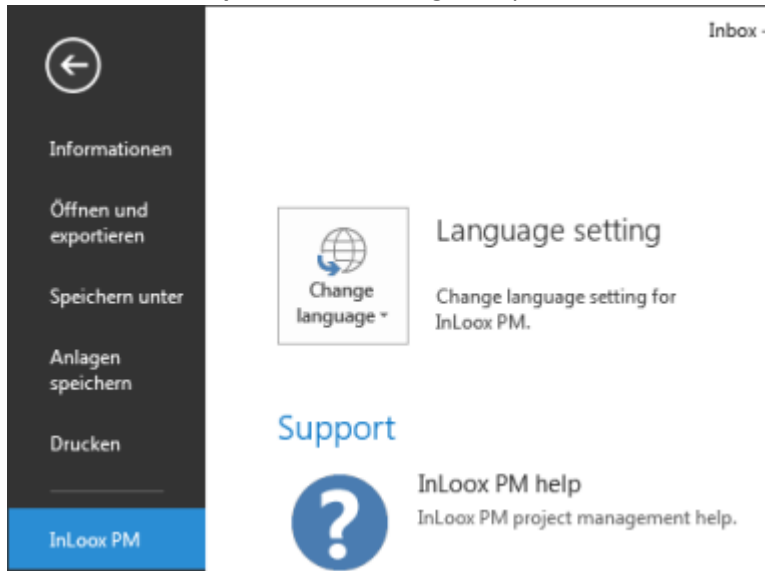
1. Click on Download in the InLoox options and the InLoox website is going to open.
2. There click on Templates and select the English version of the report templates.
3. A zip-file will be downloaded and saved on your computer in the download folder.
4. Open this folder by using the windows explorer and double-click on the zip-file to open it. Copy the templates and save them to another place on your computer.
5. Return to the InLoox options >> Reports >> Templates and click on Import.
6. Select one of the saved templates from your computer and click on Save.
7. Proceed like this for all other templates.
8. When you have finished, click on Apply in the InLoox options, to save your changes.

Open the InLoox options

In the InLoox PM options, you can make changes to the basic parameters and you can set up permissions in InLoox PM.

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

1. Click the **File** tab.
2. Click **InLoox PM Options** in the navigation pane.



TIP Users require administrator permissions to change global settings. For more information, see Set up permissions. User settings can be changed by any user.

Set user permissions

In InLoox PM, you can configure finely structured and freely definable permissions. So, you can clearly define responsibilities and make sure that only authorized users gain access to sensitive data.

You can set permissions in InLoox PM Workgroup and Enterprise Server in the InLoox PM options.

NOTE InLoox PM is delivered without permissions being set. So, every user can see and change all permissions. This might be a security risk.

Overview of role and account-based security architecture

In InLoox PM, you can select role-based and user-based permissions.

Role permissions are defined according to the function carried out by each person involved in the project, be it as project manager, team member, customer, partner or any other activity. InLoox PM then assigns the correct permission to each person assuming a given role.

IMPORTANT User account oriented permissions apply to all projects. This allows, for example, company management to look at all current and concluded projects, whereas practical responsibility remains in the hands of the project manager and team.

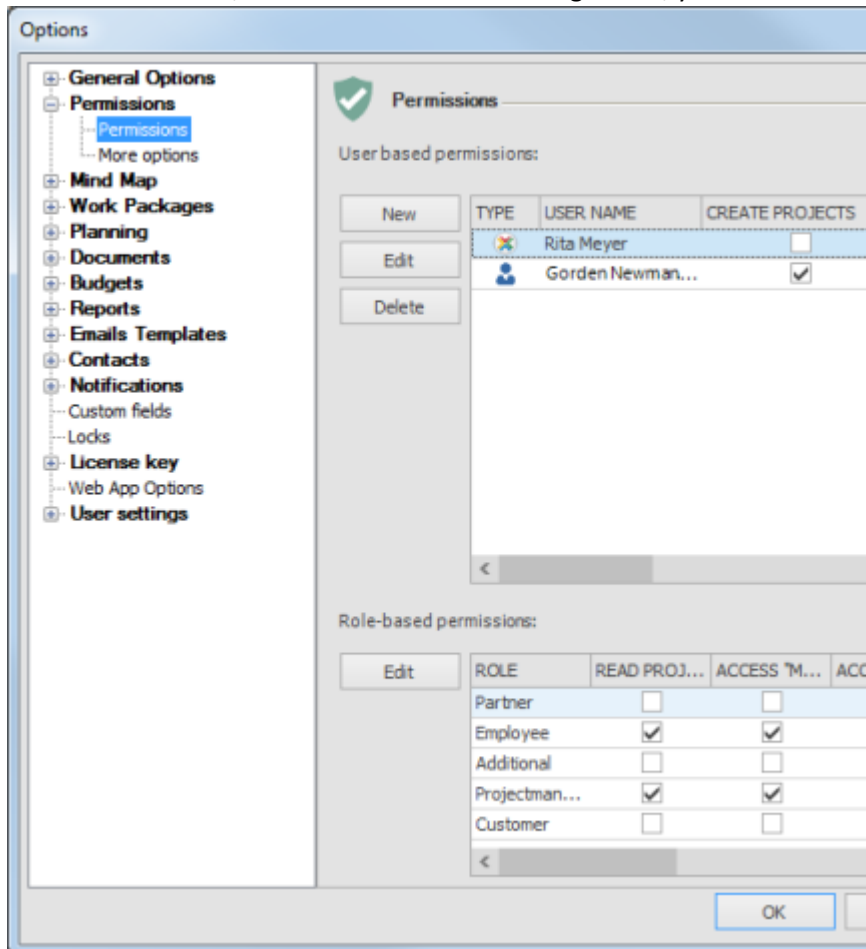
User account oriented permissions require a Windows Server with Active Directory or InLoox PM contacts. Role permissions additionally require Exchange Server.

To open the permissions please follow these steps:

1. Open the dialog box **InLoox PM Options**.

TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.

2. Under **Permissions**, click **Permissions**. On the right side, you see the **Permissions** section.



Permission

Mode Remarks

User-based permissions	<ul style="list-style-type: none"> • Permissions based on Windows and InLoox user accounts. Active directory accounts (in domain mode) and local Windows and InLoox user accounts (in workgroup mode) are supported.
------------------------	---

- Apply across all projects and on the entire database.

NOTE InLoox PM does not support Windows groups at this time.

Role-based permissions	<ul style="list-style-type: none"> • Users acquire permissions by assuming a role in a project. Project members are all persons who are listed in the project on the Management page as "In Charge".
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- Possible roles: Project manager, Team member, Customer, Partner, Other.

- Microsoft Exchange Server or InLoox contacts are required.

NOTE Persons are identified by their Windows or InLoox Security

**Permission
Mode**

Remarks

Identifier, or SID, and the Windows X400 address, or Exchange address. Persons with the same X400 address have the same role-based permissions in InLoox PM. If this is not what you want, please deactivate the role-based permissions entirely by removing all permissions for all roles.

Examples

InLoox PM 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 "Gordon Newman" is authorized to "edit projects " and "edit budgets".
TIP For more information about permissions, see List of permissions.
- "Gordon Newman" is part of the "team" in the project "Product Development"
- There are three other projects in which "Gordon Newman" is not involved and therefore does **not** have the role "team"

Consequently, these permissions apply to Gordon Newman:

- He may read and edit the project "Product Development". He may also read and edit budgets in this project. Gordon Newman has these permissions in all projects in which he is in the team role.
- "Gordon Newman" 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, Gordon Newman has no permissions for any other projects.


The following permissions apply 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 "Gordon Newman".
- Persons who are team members in other projects than "Product Development" can see, in contrast to Gordon Newman, a number of projects, but may not edit any of them.

InLoox PM permissions are very flexible and allow a wide variety of scenarios to be covered without high administration effort.

Set user-based permissions

Set user-based permissions:

- **Set permissions for a user** In the **User-based permissions** section, click **New**.
 1. In the Permissions dialog box, click the **Arrow**  to select the user.
 2. Choose from the drop-down list between **Active Directory user**, **Exchange user** or **InLoox PM user**.
 - **Active Directory user**
 - In the **Select User** dialog box, click **Object Types**.

NOTE You can also use this button  to open the **Select User** dialog box.
 - In the **From this Location** box, click **Locations** and select **Entire Network**. Click **OK**.
 - Type the required user name into the **Enter the object name to select** field.
 - Click **Check name**. A user name that has been recognized by Windows is shown underlined.
 - Click **Advanced...**, if you need to search for a user name.
 - Click **OK**.
 - **Exchange user**

In the **Select Contact** dialog box, select an address book and then the respective name from the list. Click **OK**.

TIP In the **Select Contact** dialog box, use the feature **Search by Skill**. For more information, see Assign skills to resources.

- **InLoox PM user**

In the **Select Contact** dialog box, select an InLoox PM address book and then the respective name from the list. Click **OK**.

TIP For more information on how to create an InLoox PM account, see Create an InLoox PM account.
- 3. Select the permissions for the respective user from the **Permissions** list.

TIP For more information about permissions, see List of permissions.
- 4. Click **OK**.
- **Edit user permissions** Choose one user from the list and click **Edit**. Click **OK** after you have made all changes you want.
- **Remove user permissions** Choose one user from the list and click **Delete**.

Set role-based permissions

Please follow these steps to set role-based permissions:

NOTE Role-based permissions are only active if there is at least one user-based administrator permission.

1. In the **Options** dialog box, in the **Role-based permissions** section, click **Edit** to change the selected role-based permission.
2. Select the permissions for the role from the **Permissions** list.

TIP For more information about permissions, see List of permissions.

3. Click **OK**.


Task settings

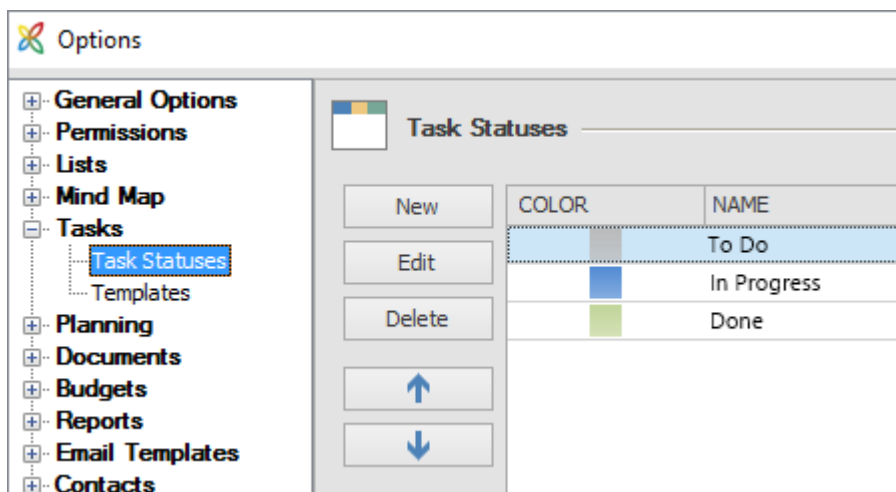
In the InLoox options, the InLoox administrator can change the structure of the Kanban board for the entire project platform, manage task templates and set the update interval in InLoox.



Customize the Kanban board

The InLoox Administrator can change the structure and the appearance of the Kanban board in the InLoox options.

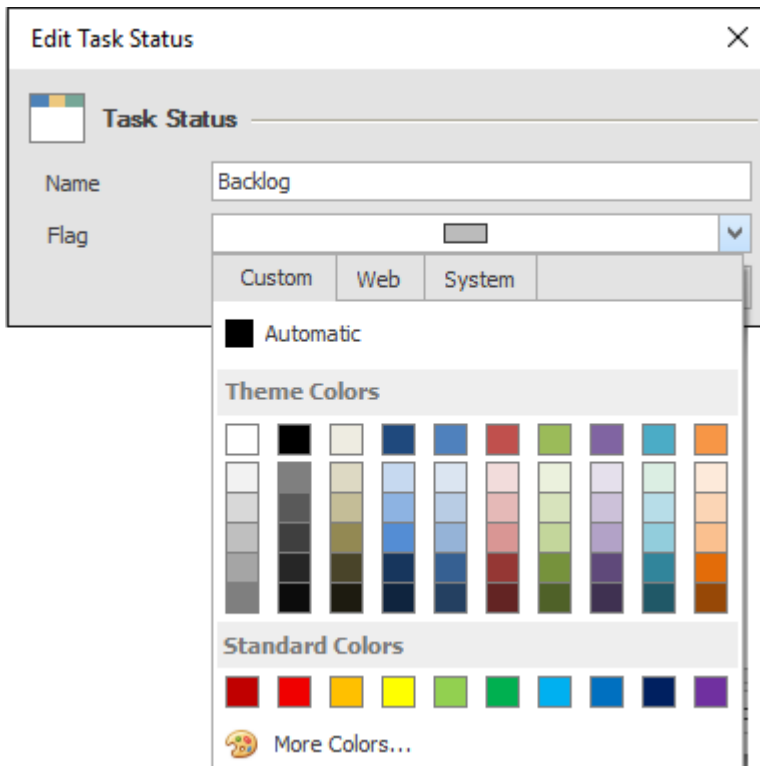
Please follow these steps to do this:

1. Click in Outlook on the **File** tab in the upper left corner, then on 
2. This will open the Options dialog. Click in the navigation pane on the left on **Tasks, Task Statuses**.
3. In the section on the right, you'll see all the names and the assigned colors of the current columns of the Kanban board that apply to all of your projects in your database. By default, your Kanban board contains three columns with the statuses To Do, In Progress, Done.





4. You can now edit the existing columns by changing their name, assigning another color or changing the order of the columns on the board. Click on the status that you want to edit.
5. To change the order of the Kanban columns, move the column to the desired position by using the arrow buttons   (the top status equals the column on the far left, the bottom status equals the column on the far right).

- To change to assigned color or the name of the column, click on the status that you want to change, then click on **Edit**.



Make all of your changes, then click on **OK**.

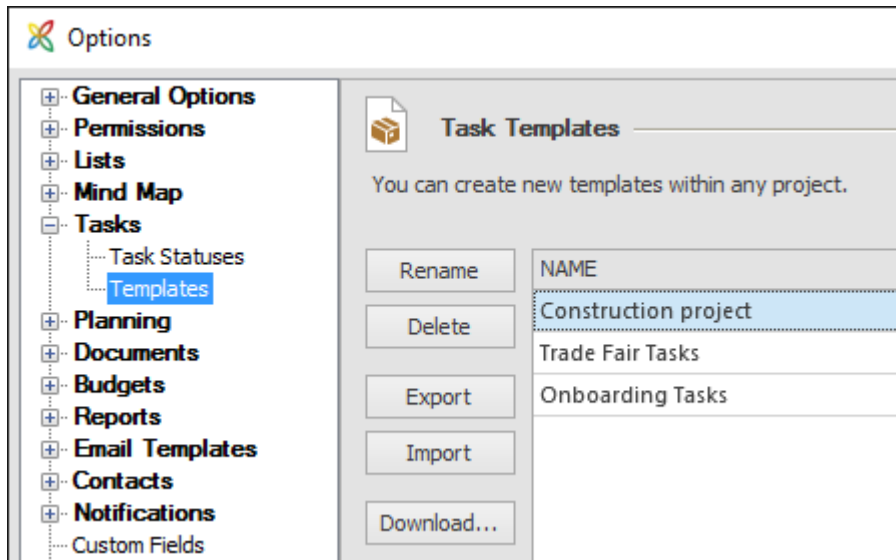
- To create a new status click on the **New** button. You will see the same dialog as shown in paragraph 6. Now, name the new status, assign a color and confirm with **OK**. Use the arrow buttons   to position the status on your Kanban board.
- When you have made all of your changes to the Kanban board, click on **OK** in the Options dialog. The changes now apply to the entire project platform.

Manage task templates

You can create, save and export task templates in every project. The InLoox Administrator can rename, delete, export and import existing templates in the InLoox options for the entire project platform.

Please follow these steps to administrate task templates:

- In Outlook, click on the **File** tab, then on **Options** under InLoox.
- This will open the Options dialog. Click in the navigation pane on the left on **Tasks, Templates**.
- Now you will see all task templates that are currently available on your InLoox database in the section on the right.
- To rename a task template, click on the name of the template, then on **Rename**.

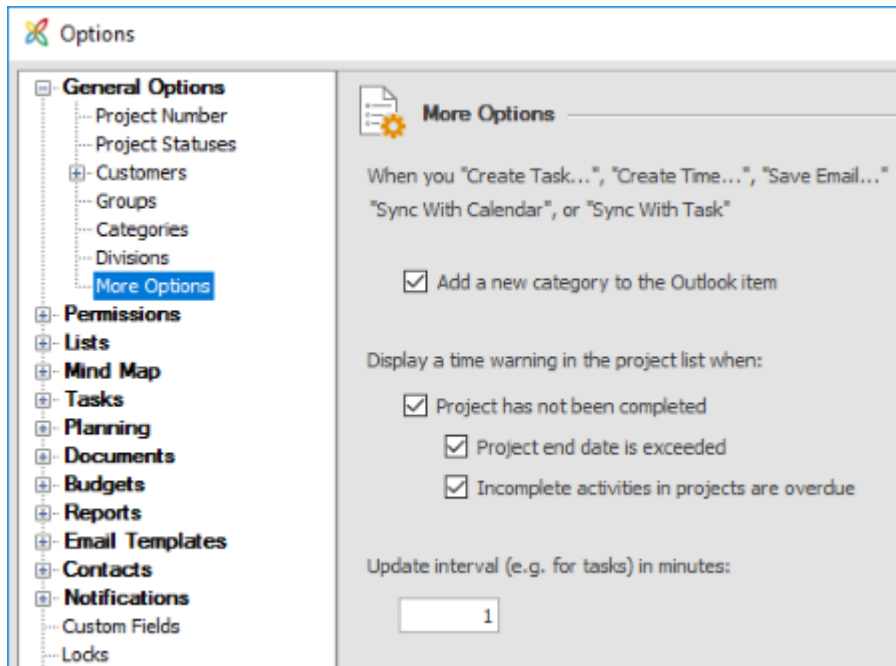


You can enter a new name and confirm with **OK**.

5. To remove a task template permanently from the database and from all InLoox projects, mark the template, then click on **Delete**.
6. To export an existing template in order to save it on your computer or file server, mark the template and click on **Export**. Now you can save the template.
7. You can also import task templates from your computer or your file server. After importing them in in the InLoox options, they are available to all users on the project platform.
8. Click on **Download** to load and use pre-made templates from the InLoox website.
9. When you are done editing your task templates, click on **OK** in the Options dialog. The changes now apply to the entire project platform.

Set the update interval

1. Open the InLoox options by clicking on the **File** tab in the upper left corner, then on the InLoox options in the navigation pane on the left.
2. In the InLoox options, click in the navigation pane on the left on **General Options, More Options**.



3. On the bottom right, you can set the update interval in InLoox in minutes for the entire project platform.
4. Confirm with **OK**.

User permission options

The following permissions apply to **the multi-user versions** of InLoox PM. Permissions for the actions listed can be assigned to users or roles.

Description	Permission	Restriction or Prerequisite
Create projects	User has the right to create new projects.	Only available with user-based permissions
Create project request	With this permission the user can add a new project request for the release, in case he does not have project permissions.	Prerequisites: InLoox PM Enterprise Server, no project permissions
Release project request	Right to release the created project requests.	Prerequisites: InLoox PM Enterprise Server, project permissions
Read projects	<ul style="list-style-type: none"> • Project visible in the InLoox PM project list. • Project can be opened. 	None

Description	Permission	Restriction or Prerequisite
	<ul style="list-style-type: none"> Project can be exported if the right to use existing reports is granted. 	
Access list	Right to read the list of a project.	Prerequisite: Read projects
Access mind maps	Right to read all mind maps of a project.	Prerequisite: Read projects
Access work packages	Right to read all work packages in the project	Prerequisite: Read projects
Access planning	Right to read all planning elements of a project.	Prerequisite: Read projects
Access time tracking	Right to read all time tracking entries of a project	Prerequisite: Read projects
Access own time tracking entries	Right to read all own time tracking entries of a project.	Prerequisite: Read projects
Access documents	Right to open and read all documents of a project.	Prerequisite: Read projects
Access budgets	Right to read all budgets, budget positions and the budget overview of a project.	Prerequisite: Read projects
Edit projects	Project can be changed. This right is a prerequisite for all actions which allow users or roles to modify data.	Prerequisite: Read projects
Edit management	Right to change the project master data on the Management page.	Prerequisite: Edit projects
Edit project contacts	Project contacts can be added, changed or deleted. It allows the user to control the roles of persons in a project.	Prerequisites: <ul style="list-style-type: none"> Edit projects Edit Management

Description	Permission	Restriction or Prerequisite
Add project notes	Allows you to create and change project comments on the Management page.	Prerequisites: <ul style="list-style-type: none"> • Edit projects • Edit Management
Access project notes	Right to read other team members' project notes on the Management page.	Prerequisite: <ul style="list-style-type: none"> • Read project
Delete own project notes	Allows you to remove your own project comments on the Management page, but not to remove other users' project comments.	Prerequisites: <ul style="list-style-type: none"> • Edit projects • Edit Management
Lock projects	Project can be locked for other users. Users without the respective permission may not edit locked projects and cannot remove the lock.	Prerequisites: <ul style="list-style-type: none"> • Edit projects • Edit Management
Edit list	Right to modify the entries in the list of one project.	Prerequisite: Read projects
Edit mind maps	Allows adding, changing and deletion of all mind maps of a project.	Prerequisite: Edit projects
Edit work packages	This permission allows you to add, modify and remove work packages.	Prerequisite: Edit projects
Edit planning	Allows adding, changing and deletion of all planning elements of a project.	Prerequisite: Edit projects
Edit time tracking	Allows adding, changing and deletion of <i>all</i> time tracking entries of a project.	Prerequisite: Edit projects
Edit own time tracking entries	Allows adding, changing and deletion of <i>own</i> time tracking entries of a project.	Prerequisite: Edit projects

Description	Permission	Restriction or Prerequisite
Edit documents	Allows adding, changing and deletion of all documents in the document list of a project.	Prerequisite: Edit projects
Edit budgets	Allows adding, changing and deletion of all budgets and budget assets of a project.	Prerequisite: Edit projects
Delete projects	Delete a project.	None
Create address books	User has the right to create new address book.	None
Read address books	Access all address books.	None
Edit address books	Allows modifying address books.	Prerequisite: Read address books
Read own address books	Access own address books	Prerequisite: Create address books
Edit own address books	Right to change own address books	Prerequisites: <ul style="list-style-type: none"> • Create address books • Read own address books
Delete own address books	Allows to remove own address books and other users' address books.	Prerequisites: <ul style="list-style-type: none"> • Create address books • Read own address books
Use existing reports	All reports can be used. The InLoox PM report generator filters the data for which the user does not have permission out of the report (e.g. if no right to read budgets has been granted, no budget data will be included in the exported reports.)	None

Description	Permission	Restriction or Prerequisite
Create and edit report templates	Allows the creation, changing and deletion of 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 PM Ribbon (in Outlook 2007 InLoox PM Toolbar) and Options:</p> <ul style="list-style-type: none"> • Edit planning templates Right to rename and delete InLoox PM planning templates. • Edit budget assets Right to create, change and delete InLoox PM budget assets. • Edit budget state Right to create, change and delete InLoox PM budget states. • Edit notifications Right to change Notification templates. • Edit categories Right to create, change and delete InLoox PM categories. • Edit custom fields Right to create, change and delete custom fields. • Remove project locks Right to remove data record locks. • Recycle projects Right to restore or permanently remove deleted projects. • Licenses Right to add and delete InLoox PM license keys. • Options Right to change the InLoox PM options. Incorporates the right to change permissions. 	Only available for user-based permissions

Interaction between InLoox and Outlook

You don't need to open InLoox via the InLoox now or InLoox PM tab, to use several important InLoox features. Because of the integration in Microsoft Outlook you can directly access some features from your Outlook inbox. Furthermore you can synchronize InLoox with your Outlook calendar, tasks and address book. InLoox and Outlook combine all relevant project management tasks on one central platform to efficiently support your daily work routine.

How to use e-mails in InLoox

While you are working in Outlook you can access some selected InLoox features via the **Start** tab. This allows you to further use specific Outlook elements in InLoox. The following InLoox icons are always available on the start tab regardless if you are working in your Outlook inbox, calendar or address-book.



By using those icons you can:

1. Create either a personal or project-related task from a selected e-mail
2. Book a time tracking entry for the selected item
3. Attach the e-mail as a document to a project

1. Create a task from an e-mail

You can either create a personal or a project-related task from an e-mail. To create an InLoox task from an e-mail, proceed as follows:

1. Select an e-mail from your Outlook inbox.
2. In the Ribbon on the **Home** tab click on the **Create task** button. Afterwards select a project from the dropdown-list (create project related-task) or select **Create free task** (personal task).



3. A new window is going to open. There you can enter all important information regarding the task. By default the subject of the e-mail is used as the task name and the e-mail content is used in the description. Both can be changed in the Task Details. Here you proceed as usual when creating a new task in InLoox:

- **Name:** By default the subject of the e-mail used for the task name. If wished, you can rename the task.
- **Description:** By default this area contains the original e-mail content. You can change the description, add important information or format the text for a better clarity.
- **Effort:** Here you enter the estimated effort in work days, hours or minutes.
- **Resource:** By clicking on the small arrow you can add one of the recent used resources. By clicking on the three points next to the arrow you can choose a resource from your contacts.
- **Start and End:** Add start and end date and time for the task.
- **Documents (only personal tasks):** If you are creating a free (personal task) you can link to already existing documents or you can add a new item.

- **Add document to project (only project-related tasks):** If you are creating a project-related task you can decide in the operation area whether you want to add documents to your project or not. Therefore, you can choose from the following options: Do not add element, Element including attachments, Element without attachments, Attachments only or Element and attachments separately. In the **Sub Folder** area you can add the document(s) to an already existing sub folder or create a new one.
- **Notifications (only project-related tasks):** If you are creating a project-related task you have to possibility to notify one or more resources via e-mail about the new task.

Project-related task

Task Details

Project Commercial Construction Project

Basic Information

Name

Description

Effort Hours ▾

Resource ... ▾

Start ▾

End ▾

Add Document to Project

Operation ▾

Sub Folder ▾

Edit

Personal task

Task Details

Basic Information

Name: ✓

Description:
 As a tech marketer, you're an expert at multitask meetings, managing budgets, building campaigns just to name a few. It can feel like life in the fast lane you have to be picky. Which ... [Read More](#)

Priscilla@HP replied to this
Have you signed up for our con
 4 SPICEUPS | 1 REPLIES

Effort: Hours ▾

Resource: ... ▾

Start: ▾

End: ▾

Documents ▴

[New link...](#)

Edit | **Comments**

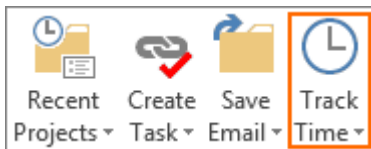
OK Cancel

4. Additionally, you can switch to the **Comments** tab where you can add further information. After adding all important information to the task, click on **OK** to save the task. A small note at your e-mail will indicate that you are using this e-mail as an InLoox element.

2. Book a time tracking entry for an e-mail

You can also book a time tracking entry directly from your inbox. Therefore, proceed as follows:

1. Select an e-mail from your Outlook inbox.
2. Click on **Track Time** in the **Start** tab. In the dropdown-list select the project where you want to store the time tracking entry.



3. A new window will open. Here you can add all important information regarding the time tracking entry:

Moreover you can decide whether you want to assign the time tracking entry to a specific task or activity of the project (use the small arrow next to task for changing between task and activity). You can also select a group (design, production, consulting) for the entry. Groups can be created in the InLoox options by any InLoox admin.

3. Attach the e-mail as a document to a project

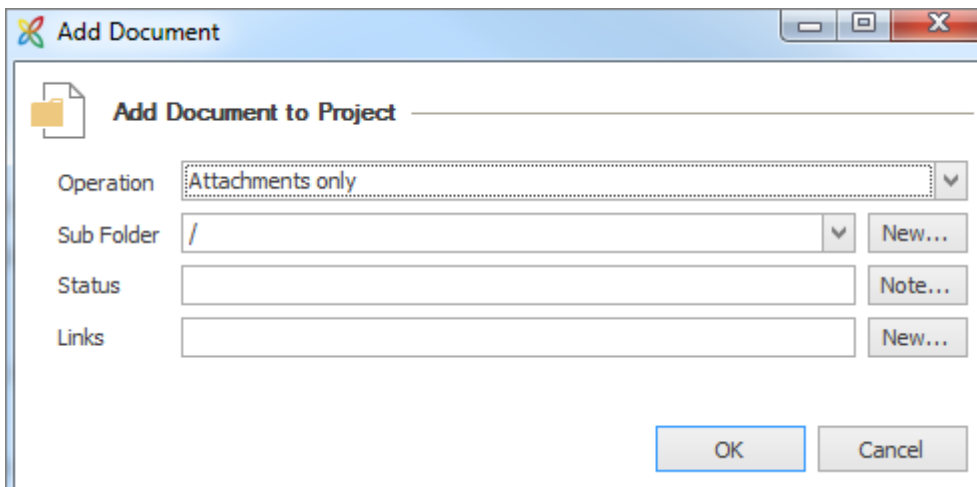
InLoox allows you to quickly assign e-mails to the document storage of a project – directly from your Outlook inbox. A reference will indicate to which project the e-mail has been assigned.

1. Select the e-mail in your Outlook inbox.
2. In the ribbon on the **Home** tab click on **Save Email**. Afterwards select from the dropdown-list the project where you want to save the e-mail.

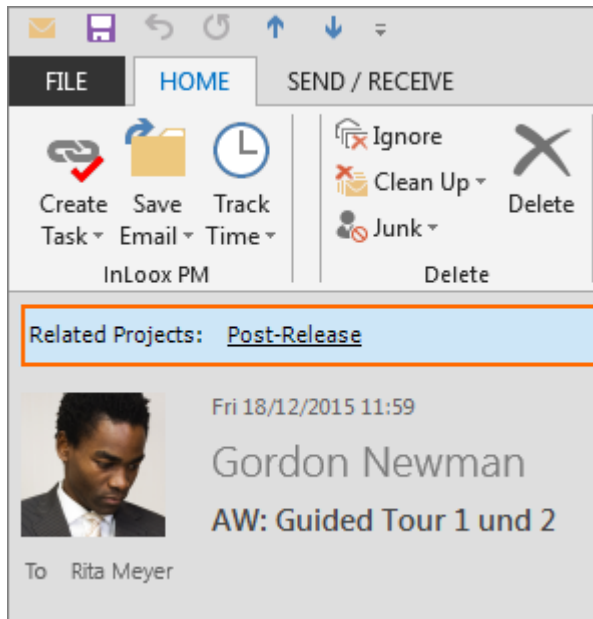


3. A new window will open. There you can change several settings regarding the document. Those settings can be viewed and changed later (*Right click on the document in the project >> Edit*). The following settings are available:

- **Operation:** Decide how you want to save the e-mail as a document: Element including attachments, Element without attachments, Attachments only or Element and attachments separately.
- **Subfolder:** You can save the e-mail in a subfolder of your project. If there is no suitable subfolder for the e-mail yet, you can create a new subfolder directly in the dialog.
- **Status:** You can also assign a status to the e-mail or add a new note for other team members.
- **Links:** Create a link to a project element in the mind maps, tasks, planning or time tracking section.



4. When you have finished click on **OK** and the e-mail will be saved a document of the selected project. Double click on the e-mail in your inbox and a reference will indicate that it has been assigned to a project. If the assigned email was addressed to several recipients, each of them sees to which project this email has been assigned. This prevents duplicating the email as a project-document. For this to work, the recipients have to be working on the same InLoox database.



The following table gives an overview to the benefits and drawbacks of the different operation possibilities:

Method	Action	Pros & cons
Element with attachment	InLoox PM assigns the email and the attachment in file form 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 only 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 PM.
Attachment only	InLoox PM 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 PM.
Element and attachment separately	InLoox PM assigns the email and attachment to the project separately	<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.

Synchronization between InLoox and Outlook

Synchronization of InLoox planning elements with Outlook calendar or Outlook task list

In the InLoox planning you can synchronize single planning elements with your Outlook calendar or the Outlook task list. As a huge benefit of this feature, any changes to your project plan are automatically synchronized with Outlook.

1. We start from your Outlook inbox. Open the **InLoox now** or **InLoox PM** tab and click on **Projects** to open the project overview. Double click on a project to open it.
2. Now click on **Planning** in the **Home** tab.
3. Select the planning element (milestone, activity, task) – that you want to synchronize with Outlook – from your project plan. Then open the **Edit** tab and click on **Synchronize With**.
4. Here you can choose between two options:
 - **Outlook Task List:** A new task is created for the selected planning element in your Outlook task list.
 - **Outlook Calendar:** A new entry in the Outlook calendar is created for the selected planning element.

All changes that you make to the project plan and affect the synchronized element are automatically synchronized with Outlook after saving.

Synchronization of InLoox tasks with Outlook calendar or Outlook task list

In the InLoox task overview you can synchronize single tasks with the Outlook calendar or the Outlook task list. As a huge benefit of this feature, any changes to your tasks are automatically synchronized with Outlook.

1. We start from your Outlook inbox. Open the **InLoox now** or **InLoox PM** tab and click on **Tasks** to open the task overview.
2. Select the task– that you want to synchronize with Outlook – from the task overview. Then open the **Start** tab and click on **Synchronize With**.
3. Here you can choose between two options:
 - **Outlook Task List:** A new task for the selected InLoox task is created in your Outlook task list.
 - **Outlook Calendar:** A new entry in the Outlook calendar is created for the selected task.

All changes that you make to your tasks and affect the synchronized Outlook element are automatically synchronized with Outlook after saving.

InLoox email templates

Using pre-defined InLoox text elements for your e-mails speeds up your project communication. InLoox e-mail templates provide pre-defined and project-related information for different e-mails. You can add new e-mail templates as well as modify the default templates in the InLoox options.

Work with E-mail templates

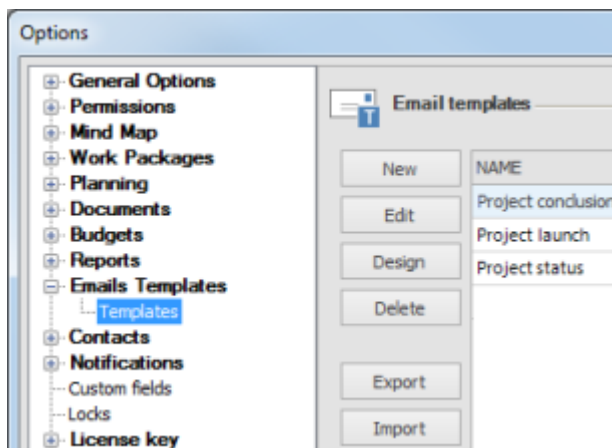
Proceed as follows to use the InLoox e-mail templates:

1. Open a new email.
2. Click on **Email Templates** on the **Message** tab. Select an e-mail template from the dropdown-list.
3. The text template will be added to your email. In the template defined recipients will be inserted.
4. Now you can edit recipients or the e-mail content. When you have finished click on **Send**.

Manage E-mail templates

InLoox offers four different default e-mail templates (project request, project launch, project status and project conclusion). Those default templates can be edited by an InLoox admin in the InLoox options. The admin can also create individual templates (administrator permission needed!).

1. Click on **File** and then on **InLoox Now Options** or **InLoox PM Options** to open the InLoox options.
2. A new window will open. In the navigation area on the left click on **Email Templates >> Templates**. An overview to the already existing templates will open.



In the overview you can (1) create a new e-mail template, (2) edit existing templates, (3) design e-mail templates, (4) delete existing templates, (5) export templates or (6) import templates.

(1) Create a new e-mail template

1. To create a new e-mail template click on **New**.
2. A new window will open. Here you can add information about the new template:
 - Name the e-mail template.
 - Define rules for the e-mail fields **Recipient**, **CC Recipient**, **BCC Recipient** and **Subject**. Therefore, click on **Fields** and select a field from the dropdown-list like **PROJECT_MANAGER**.
3. Afterwards click on **OK** to close the dialogue and save the new template.

4. Now a new window will open (InLoox Report Designer), where you can edit the template individually. How to work with the InLoox Report Designer is explained in the chapter The InLoox Report Designer (The InLoox Report designer features are restricted for e-mail templates and not as extensive as for InLoox reports). When you have finished, click on **Apply** in the InLoox options to save your changes.

(2) Edit e-mail templates

For changing the general details (Name, rules) of an e-mail template select the template from the overview and click on **Edit**. A new window will open, where you can edit the general settings. When you have finished click on **OK** to close the window. Back in the InLoox options click on **Apply** to save your changes.

(3) Design e-mail templates

For changing the content of an already existing e-mail template select the template from the overview and click on **Design**. A new window will open (InLoox Report Designer), where you can edit the template content individually. How to work with the InLoox Report Designer is explained in the chapter The InLoox Report Designer (The InLoox Report designer features are restricted for e-mail templates and not as extensive as for InLoox reports). When you have finished, click on **Apply** in the InLoox options to save your changes.

(4) Delete e-mail templates

To permanently delete an e-mail template select the template from the overview and click on **Delete**. Afterwards click on **Apply** in the InLoox options, to save your changes.

(5) Export e-mail templates

For saving e-mail templates on your computer locally, select a template from the overview and click on **Export**. Afterwards select the storage location and click on **Save**. When you have finished, click on **Apply** to save your changes.

(6) Import e-mail templates

For importing e-mail templates that are saved locally on your computer, click on **Import**. A new window will open where you select the template and click on **Open**. When you have finished, click on **Apply** to save your changes.

Lists

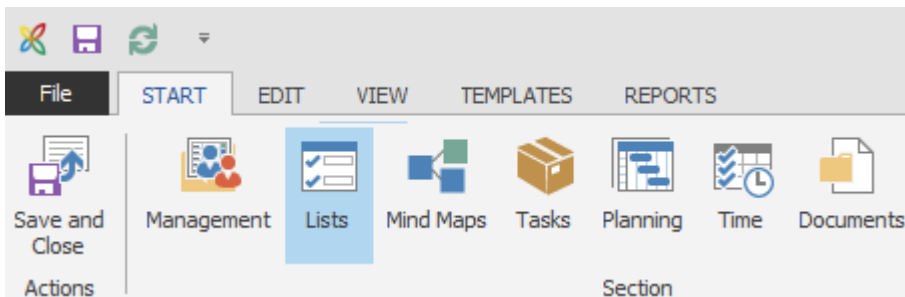
Create and edit a to-do list

With the list feature, you can create check lists and to do lists for your project and structure project information in a very early stage of your project, without having to create tasks or a timed project plan.

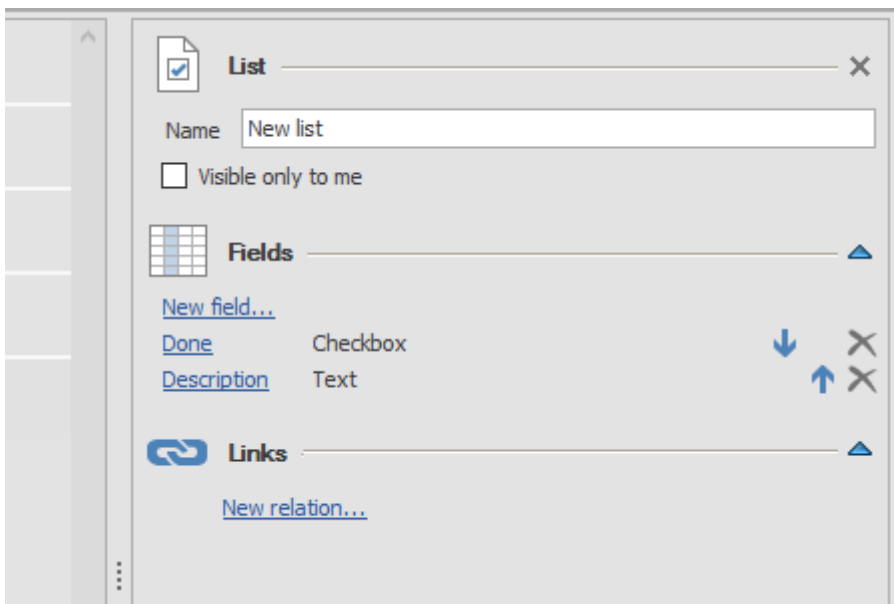
You can only create project-related lists, i.e. lists that belong to an InLoox project.

This is how you create a new list for your project:

1. Open the project to which you want to add a new list.
2. In the project, on the **Start** tab, click on **Lists** in the Ribbon.

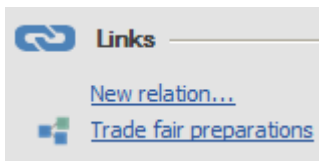


3. On the **Edit** tab, click on **New list**.
4. In the side panel on the right, you can name your list.



5. If you want to create a personal check list with your own to-dos, then activate the **Visible only to me** checkbox. When you have activated the checkbox, other team members aren't able to see this check list.
6. In the Fields area, you can now build your list out of different field types. You can use the following field types:
 - Text
 - Date

- Integer
 - Decimal number
 - Checkbox
7. Click on **New field** to add more fields to your list and name them however you like.
 8. Use the arrows to change the order of the fields in your list, use the cross to delete a field from your list.
 9. Click on **New link** in the right side panel if you want to link your list to one of the following elements of your project:

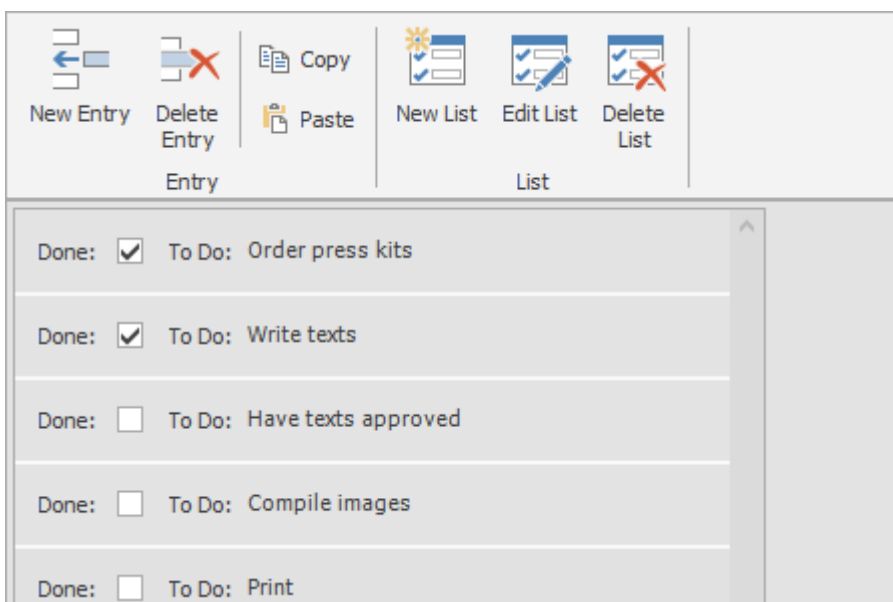


- Mind map nodes
- Tasks
- Planning elements in the Gantt chart
- Time tracking entries
- Documents
- Budgets
- Budget positions

With a click on the regarding link, you can navigate directly to the corresponding element in the project, e.g. to the mind map node the list belongs to.

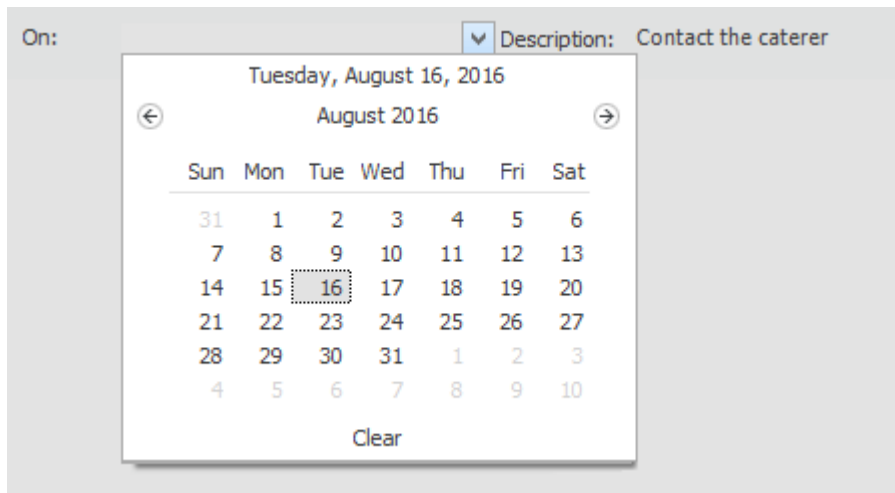
10. Now, add more entries to your list. Click on the **Edit** tab on **New entry**. You can type the text directly in the list into the line.

Example: Classic check list with checkbox and text



Create a classic check list to tick boxes with the field types checkbox and text.

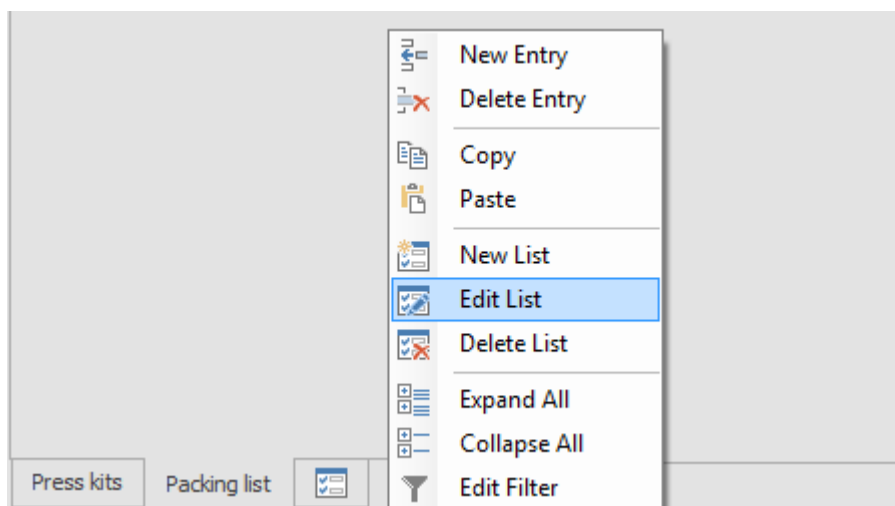
Example: List with dates



Create a list with dates with the field types date and text. Click on the little arrow in the date area of the list to select a date for each list entry.

On the View tab, you can change between a card and a list view. These views only have an impact on what your list looks like, they do not alter the content.

On the tabs on the bottom left, you see all lists that have already been added to your project. You can add as many lists to your project as you like and navigate from list to list there. Click on the right mouse button to open a context menu with which you can create new lists and edit or delete existing lists.



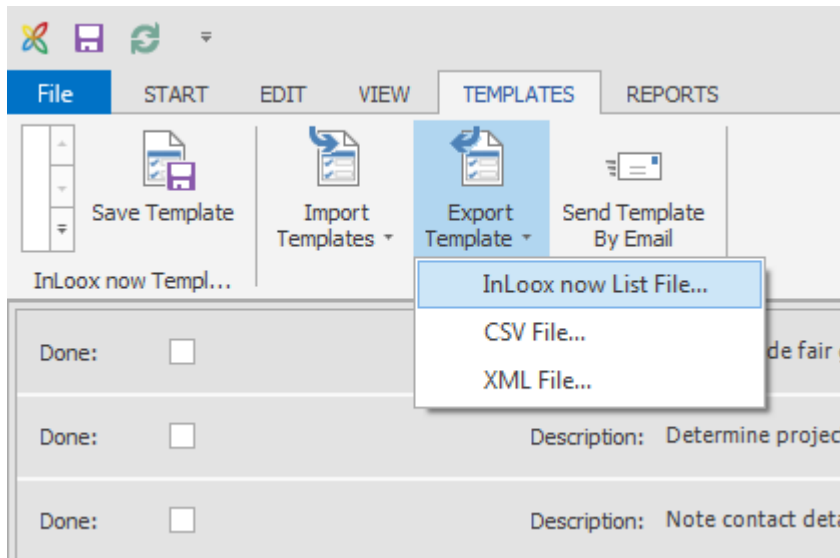
In the Ribbon, on the **Edit** tab, click **Edit list** to also change the list you are currently on.

Create a list template

You can set up list templates for checklists that are relevant for all your various projects.

Create a checklist first, that you would like to use in a project of your choice.

TIP To learn how to create a new list see Create a new list.



Do the following:

1. Save the list as usual. To export the list as a template, click on the **Export Template** button on the **Templates** tab. You can save the list for further use as an InLoox list template file or as a CSV- or XML-file on your computer or your file server.
2. To use the list in another project, please open the project in which you want to use the list, then click on the **Lists** button on the **Start** tab, then click on the **Templates** tab.
3. Click on the **Import Templates** button and select the regarding list template from your computer or your file server.
4. Alternatively, you can save the list template directly in InLoox PM for Outlook. To do so, please open the list that you want to save as a template and click on the **Templates** tab on the **Save Template** button in the Ribbon.

Now, the list template is available directly in InLoox PM for Outlook in the **Lists** section in the project on the **Templates** tab.

Mind Maps

Create a mind map

Visually collect and organize your ideas in mind maps. Thereby you get an overview over all ideas, concepts and drafts. When creating a mind map we differentiate between two approaches:

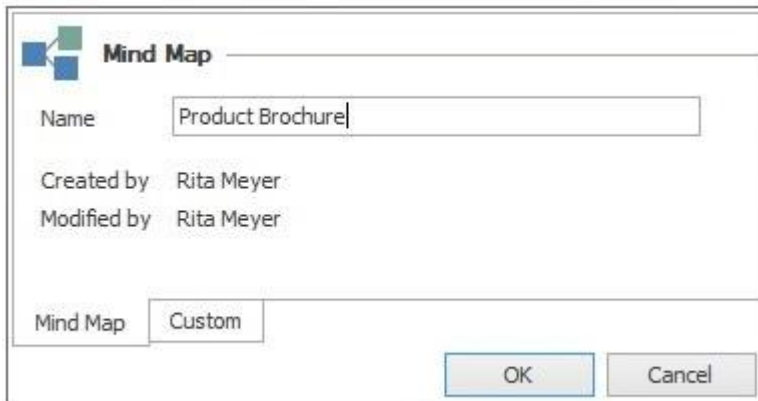
- Plan-based approach: The main nodes of the mind map correspond with the project phases (Top-Down).
- Task-based approach: The main nodes of the mind map correspond with the tasks of the project (Bottom-Up).

How to create a plan-based mind map

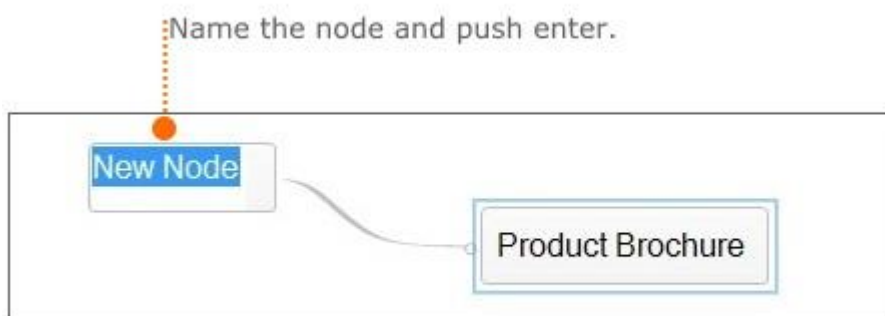
Visually collect and organize your ideas in mind maps to you get an overview over all ideas, concepts and drafts. When you are using the plan-based approach, you should ensure that the main nodes of your mind map correspond with the project phases (Top-Down).

1. Open an existing project or create a new one.

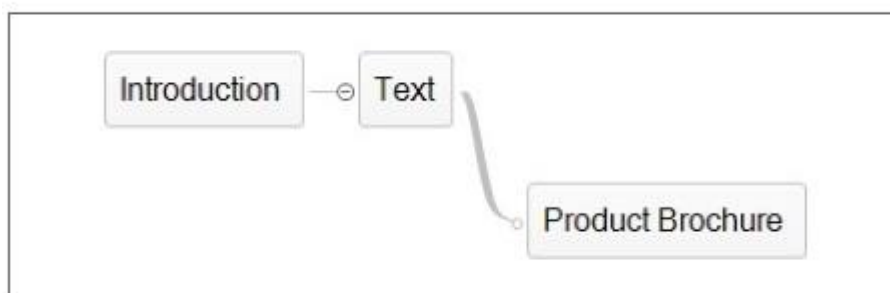
2. To create a new mind map click on **Mind Maps** on the **Start** tab.
3. To name the mind map right-click somewhere in the mind map area and click on **Edit Mind Map** in the context menu. A new window will open. Type a name for your mind map in the Name field.



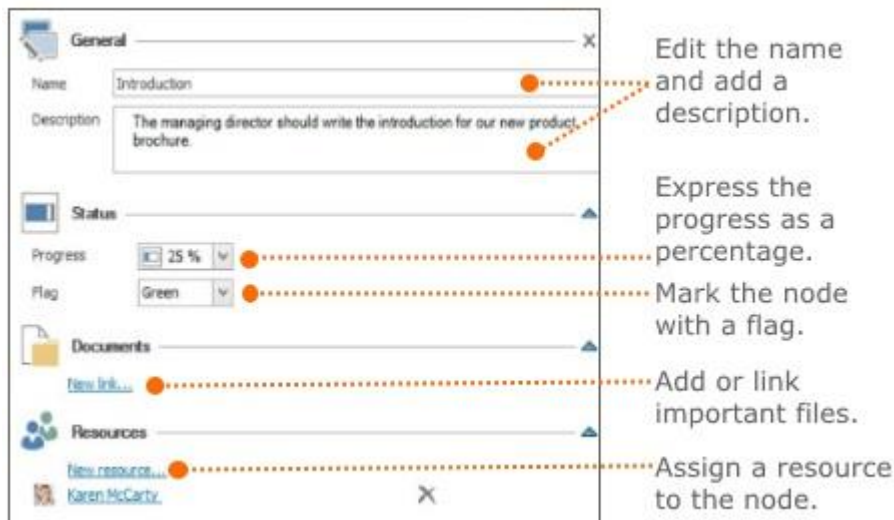
4. Create as many nodes as needed. Following the plan-based approach, the main nodes correspond with the project phases. To create a node, right-click on the node in the middle and click on **New Node** in the context menu.
5. By default a new node is created as a sub-node of the marked node.



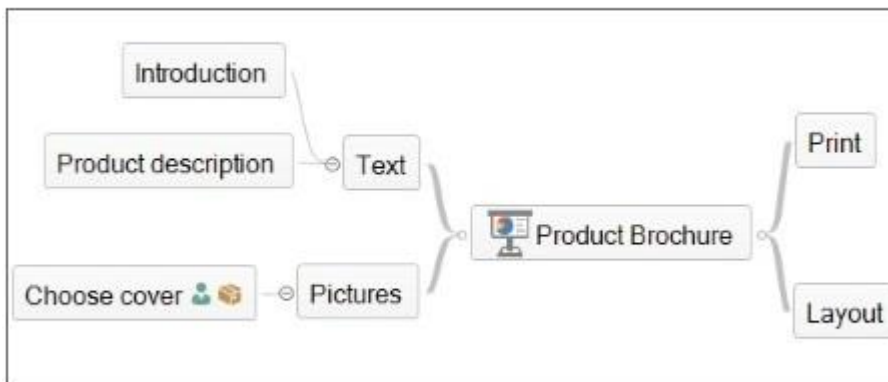
6. To create sub-nodes select a node and right-click to open the context menu. Click on **New Node** in the context menu. A sub-node that is directly connected to the selected node appears in the mind map. Name the sub-node and push enter.



7. To edit a node, right-click on it and choose **Edit** in the context menu.
8. A side panel opens on the right side. Here you can save and edit additional information.



9. Create as many nodes as needed and position them by drag-and-drop.
10. Format the mind map and edit the background color of a node or add a symbol to it. For more information on formatting see Selected Mind Map features.



11. When you are finished you can copy the mind map to the planning. Therefore see the following chapter: Copy a mind map to the planning

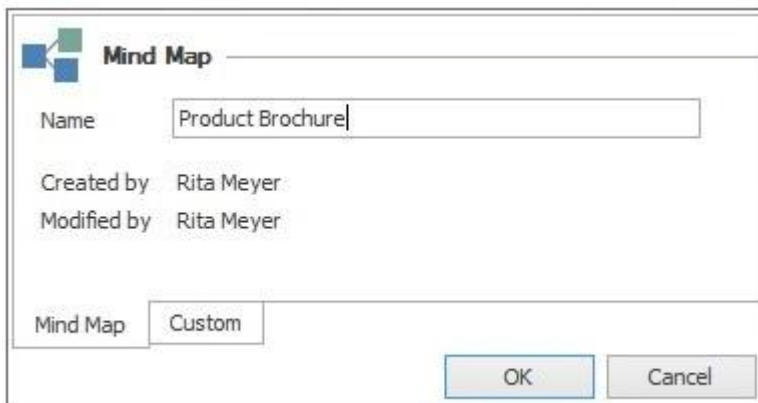
Create another mind map

To create another mind map in the same project click on the mind map symbol in the lower menu bar or use the keyboard shortcut **Ctrl+M**.

How to create a task-based mind map

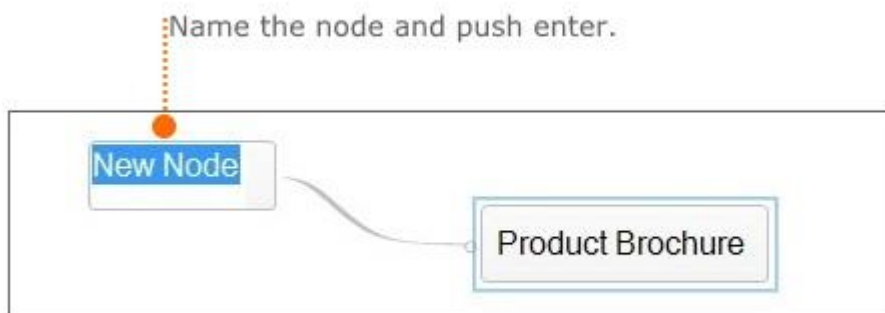
Visually collect and organize your ideas in mind maps to you get an overview over all ideas, concepts and drafts. When you are using the task-based approach, you should ensure that the main nodes of your mind map correspond with the tasks of the project.

1. Open an existing project or create a new one.
2. To create a new mind map click on **Mind Maps** on the **Start** tab.
3. To name the mind map right-click somewhere in the mind map area and click on **Edit Mind Map** in the context menu. A new window will open. Type a name for your mind map in the Name field.



4. Create as many nodes as needed. Following the task-based approach, the main nodes correspond with the tasks of the project. To create a node, right-click on the node in the middle and click on **New Node** in the context menu.

5. By default a new node is created as a sub-node of the marked node.



6. To create sub-nodes select a node and right-click to open the context menu. Click on **New Node** in the context menu. A sub-node that is directly connected to the selected node appears in the mind map. Name the sub-node and push enter.



7. To edit a node, right-click on it and choose **Edit** in the context menu.

8. A side panel opens on the right side. Here you can save and edit additional information.

Edit the name and add a description.
 Express the progress as a percentage.
 Mark the node with a flag.
 Add or link important files.
 Assign a resource to the node.

9. Create as many nodes as needed and position them by drag-and-drop.

10. Format the mind map and edit the background color of a node or add a symbol to it. For more information on formatting see Selected Mind Map features.

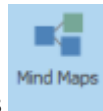


11. When you are finished you can create tasks from the mind map. Therefore see the following chapter: Create tasks from a mind map.

Create another mind map

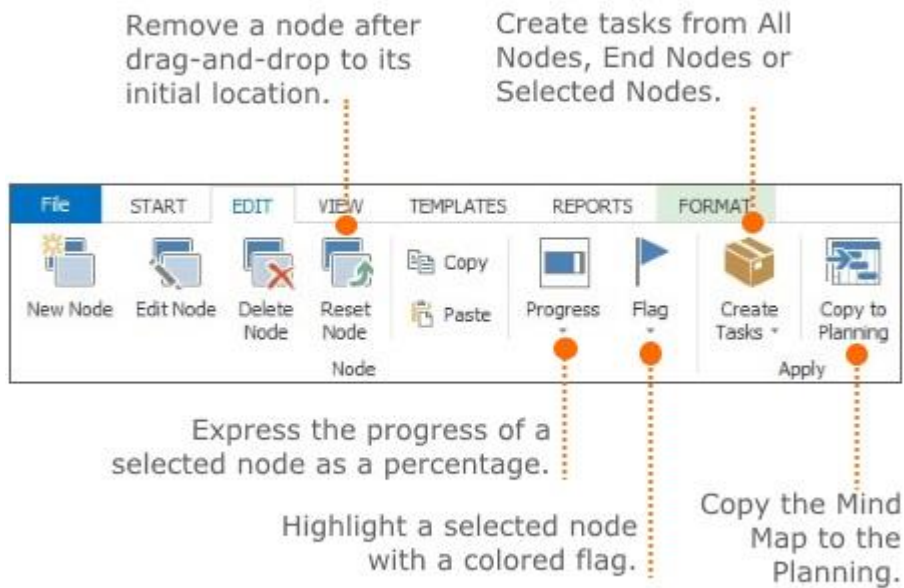
To create another mind map in the same project click on the mind map symbol in the lower menu bar or use the keyboard shortcut **Ctrl+M**.

Selected Mind Map features

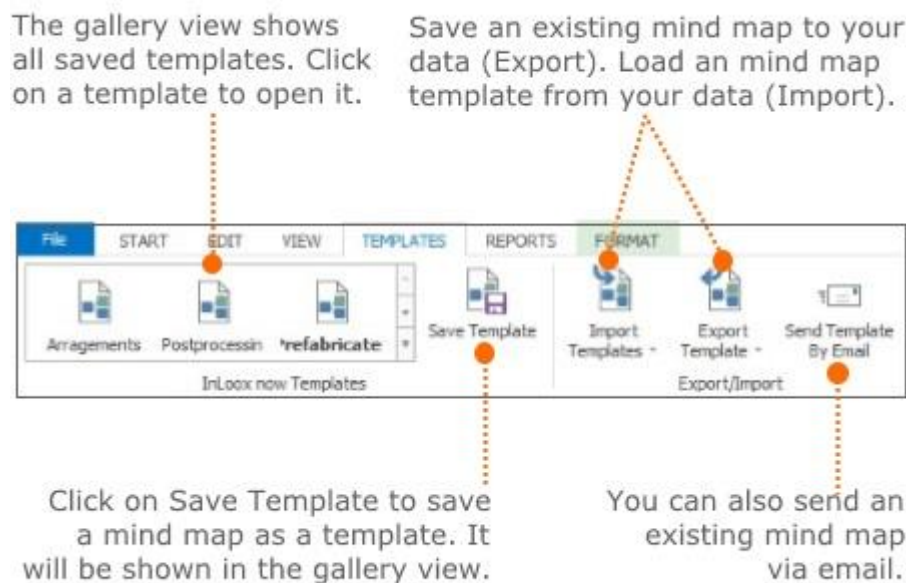


Open a project and click on **Mind Maps** on the **start** tab to open the Mind Map page. InLoox offers you various features for creating and designing mind maps.

1. Features on the Edit tab

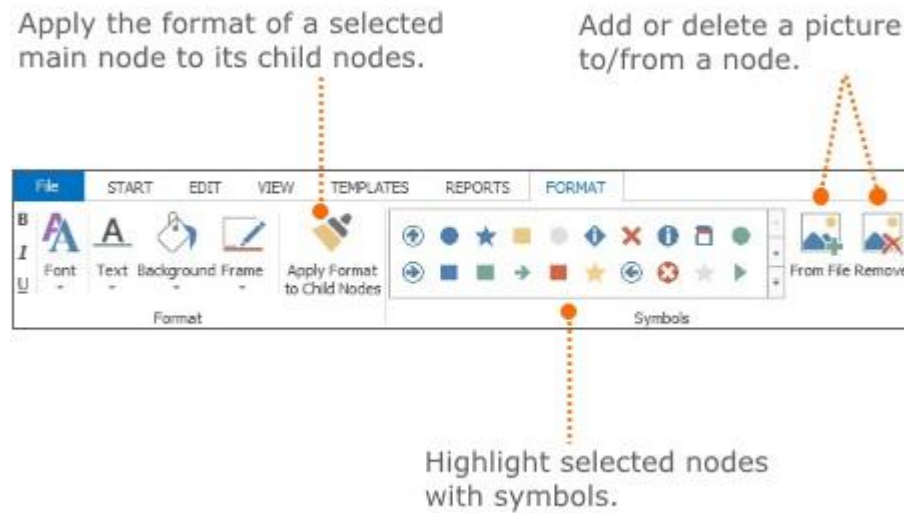


2. Features on the Templates tab



3. Features on the Format tab

The Format tab allows you to customize font, background and frame color of selected nodes. Additionally, you can use further helpful features:



Create tasks from a mind map

You can create tasks from existing nodes of your mind map. This procedure is most suitable when you have created the mind map following the task-based approach. Which means the main nodes of your mind map correspond with the tasks of the project (Bottom-Up).

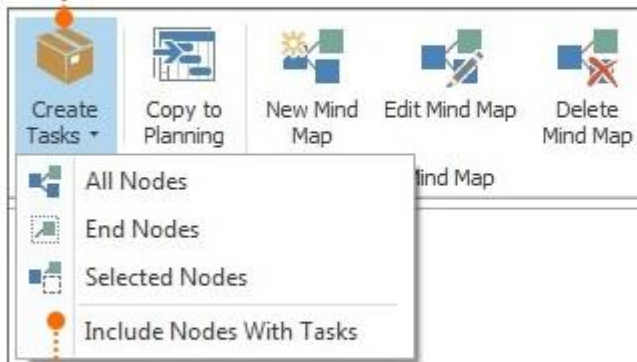
For more information on the task-based approach see: [How to create a task-based Mind Map](#)

Or watch our video tutorial on that topic: [Task-based Mind Mapping](#)

Proceed as follows:

1. Open an existing project or create a new one.
2. To open an existing mind map click on **Mind Maps** on the **Start** tab.

Click on Create Tasks in the Start tab.



You can transform All Nodes, End Nodes or Selected Nodes into tasks.

- **All Nodes:** All nodes of the mind map including the main node are transformed into tasks. The tasks are automatically transferred to the task area of your project.
- **End Nodes:** Only the end nodes of your mind map are transformed into tasks. Those can be accessed in the task area of your project later on.
- **Selected Nodes:** First choose the nodes in the mind map, you want transform into tasks. Afterwards click on **Create Tasks** and then on **Selected Nodes**.
- **Include Nodes with Tasks:** Select this option to once again create tasks from nodes, which have already been transformed.

3. After you have selected an option the **Task** page with the new tasks automatically opens. The tasks that have been transferred from the mind map are marked with a mind map symbol. In the mind map all nodes that already have been transformed into tasks are marked with a task symbol.

For more information, on how to add important information to tasks, see Create and edit tasks.

Copy a mind map to the planning

You can copy the structure of a mind map to the planning. Thereby each node will be transformed into an activity in the planning. This procedure is most suitable when you have created the mind map following the plan-based approach. Which means that the nodes of your mind map correspond to the project phases (Top-Down).

Proceed as follows:

1. Open an existing project or create a new one.
2. To open an existing mind map click on **Mind Maps** on the **Start** tab.
3. Click on **Copy to Planning** on the **Edit** tab. A new dialog box will open.

- Choose between **Automatic calculation** and **Manual calculation** to define the start date for the planning. For the manual calculation enter an individual start date.
- Additionally, you can define the duration for each activity by using work days, hours and minutes. In general, the duration of activities that have been copied from a mind map is the same. You can customize the duration of activities in the planning.

4. Click on **OK** and the planning will open. Each node of the mind map is displayed as an activity. For more information on planning see: Project planning

Export a mind map template

You can save mind maps as templates to re-use them for other projects. You can save the template on your computer as well as to the InLoox templates gallery view.

TIP You can manage mind map templates in the InLoox options: Manage mind map templates

How to save a mind map template to your computer

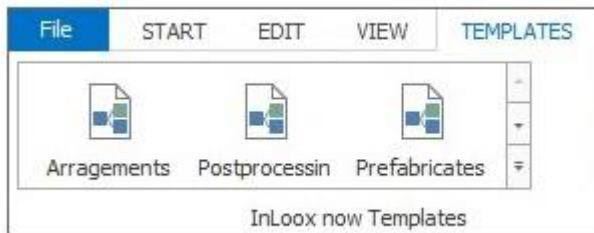
1. Open an existing mind map.
2. Click on **Export Template** on the **Template** tab, to save the mind map on your computer. Choose one of the following formats in the drop-down-list:
 - **InLoox Mind Map File**
 - **MS Project XML File**
 - **Picture**
 - **Vectorgraphics:** Use this format in any other file you want and edit it. With copy & paste you can easily export the mind map structure as a vectographic.

TIP For more information on how to re-use the templates later on see: Import a mind map template

How to save a mind map template to the InLoox templates gallery view

1. Click on **Save Template** on the **Templates** tab.

2. Name the template in the new dialog box and click on **OK**.
3. The saved template can be accessed on the **Templates** tab in the InLoox templates gallery view:



Import a mind map template

Mind map templates simplify the creation of mind maps. Templates contain predefined nodes and resource data.

TIP For more information on how to create a mind map template, see [Export a mind map template](#)

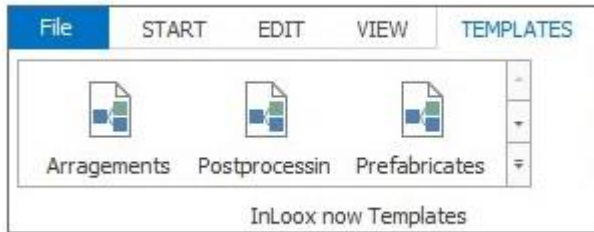
TIP You can manage mind map templates in the InLoox options: [Manage mind map templates](#)

How to open a mind map template from your data

1. Open an existing mind map.
2. Click on **Import Template** on the **Template** tab, to load an existing mind map from your computer. Choose one of the following formats in the drop-down-list:
 - MS Project File
 - MS Project Exchange File
 - MindManager MMAP File
 - MindManager XML File
 - MS Project XML File
 - InLoox PM Mind Map File

How to open a template from the InLoox gallery view

1. Open an existing project or create a new one.
2. To open an existing mind map click on **Mind Maps** on the **Start** tab.
3. Open the **Templates** tab and click on a template in the gallery view:



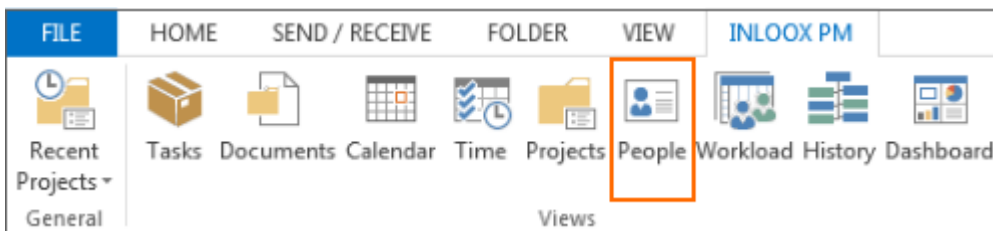
People/ Contact management

The InLoox contact feature is a global contact management tool. It can be used as an alternative to the exchange server. InLoox contacts (people) as well as address books are accessible for all InLoox database users. Additionally, the user can create own contacts and address books that are not visible for everyone.

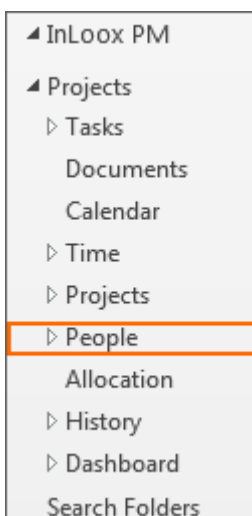
All InLoox now! users need the contact management for adding new users to InLoox now!.

Important: This default setting is valid for all InLoox versions except InLoox Personal Edition and InLoox Personal Plus Edition. Those versions don't offer the InLoox contact feature. Therefore the **People** button is not visible in the ribbon. In the tree structure the **People** tab is visible, but the feature is deactivated.

InLoox People in the ribbon:



InLoox People in the tree structure:



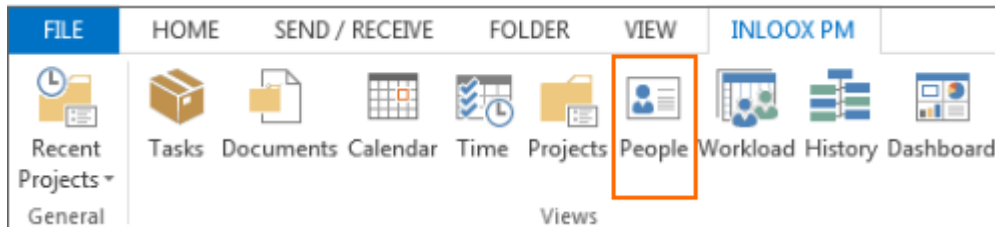
Create, edit and delete InLoox contacts

Create a new contact

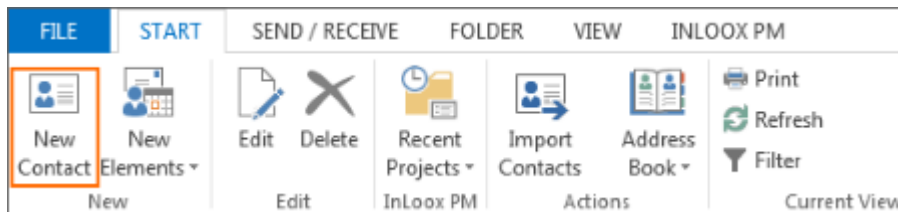
By using the InLoox contact management tool you can manage important contact information of customers, partners, colleagues etc.

To create a new contact proceed as follows:

1. Click on the **People** icon in the **InLoox PM** or **InLoox now** ribbon. Afterwards, choose an address book in the tree structure on the left below **People**. (If you haven't created an address book yet, you can use the "InLoox Address List" address book.)



2. Click on **New Contact** on the **Start** tab.



3. A new window will open. Here you can enter all important contact information:

The screenshot shows the 'CONTACT' form in InLoox. The form is divided into several sections, each highlighted with an orange box and a number:

- (1)** The 'Actions' group at the top left, containing 'New Contact', 'Save and Close', 'New Email Notification', and 'Image'.
- (2)** The 'Internet' section, containing fields for 'Email*', 'Display as*', and 'Website'.
- (3)** The 'Permissions' and 'Licenses' sections at the top right, containing 'Create Projects', 'Allow Login', 'Administrator', and '5 Available User Licenses'.
- (4)** The 'More' section on the right, containing a 'Birthday' dropdown and a 'Note' text area.

Other sections visible include 'General' (with fields for Title, First name, Last Name, Company, Department, Line Item, and a profile picture placeholder) and 'Address' (with fields for Street, Zip Code, City, and Country). The 'Phone' section contains fields for Phone, Phone 2, Mobile, Fax, and Pager.

- **(1) General:** Enter Title, First Name, Last Name as well as the company the person is working for. Additionally, you can add a picture by clicking on the grey default picture or on **Image** in the ribbon. Then you choose a picture and click on **Open**.
- **(2) Contact details:** Afterwards, you can add additional contact details in the areas Internet, Phone and Address.
- **(3) Permissions & Licenses:** InLoox Admins have access to special features in the permissions and licenses area. InLoox Admins can create a user account for InLoox PM or InLoox now for the new contact by clicking on **Allow Login**. The persons automatically receives a user license provided that this feature is activated in the InLoox options. Additionally, it is necessary that you have unused user licenses left. For more information see Create an InLoox user account.
- **(4) More & Note:** Finally, you add the birthday and if necessary a note. When you are clicking into the note area, the additional tab **Format** appears in the ribbon. The Format tab provides several features for formatting the note:



The formatting features are oriented towards common word processing programs. For more detailed information on the formatting feature see bullet point 7. in How to create a new project.

4. When you are finished, click on **Save and Close** in the **Contact** tab. The contact is added to your address book and appears in the contact overview.

Edit a contact

To edit a contact double-click on the contact in the address book. A new window will open and you can edit all contact details. When you are finished, click on **Save and Close**.

Delete a contact

To delete a contact you have to options:

- Select the contact in the address book and click on **Delete** in the **Start** tab.
- Right-click on the contact to open the context menu. Click on **Delete** in the context menu.

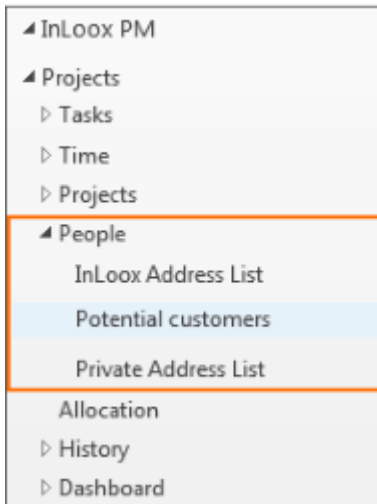
Manage InLoox address books

By using InLoox address books you can administrate your InLoox people (contacts). The address book "InLoox address list" is accessible for all users by default. It's a global address list to which all users of

your database have access. Additionally, you can create as much address books as you need. You can determine the accessibility for each address book (exception: InLoox address list).

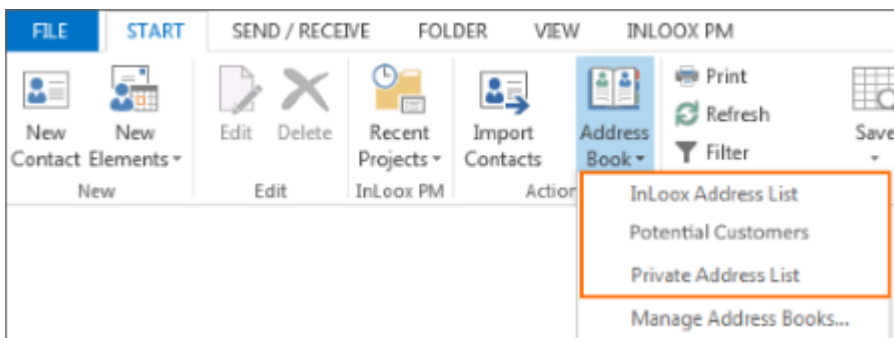
Address book view

You can access InLoox address books via the tree structure on the left. Click on **People** in the tree structure and you will see all existing address books below:

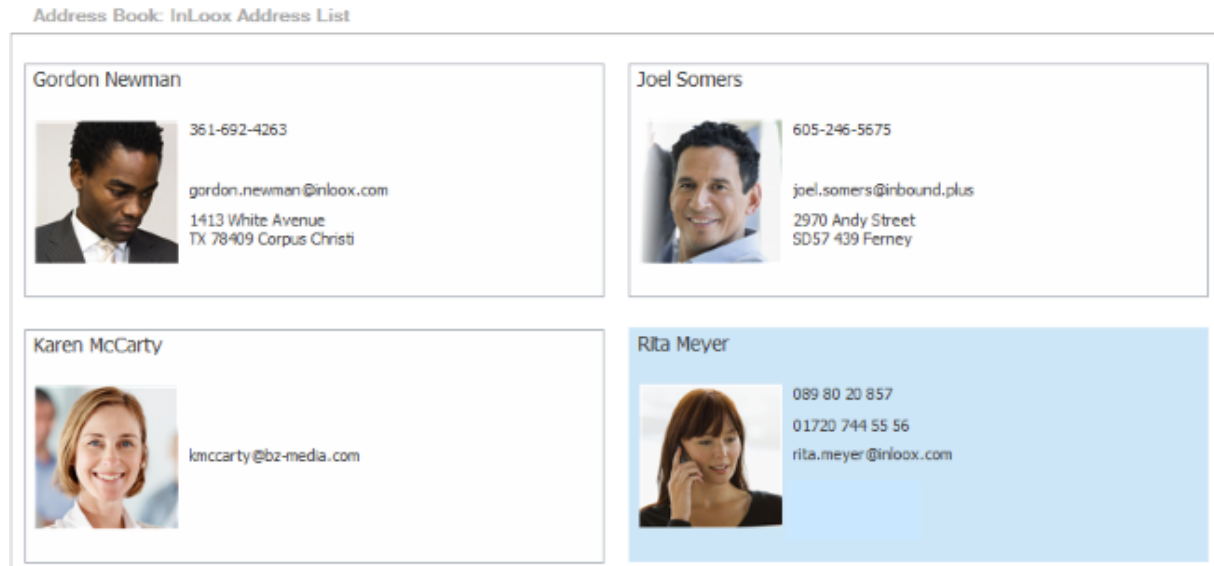


Afterwards, click on an address book to open it.

Alternatively, you can access the address books via the ribbon. Therefore click on the **InLoox now** or **InLoox PM** tab and then on **People**. The InLoox address list will open. To open another address book click on **Address Book** in the **Start** tab and choose an address book from the drop-down-list.



Below you can see the address book view:

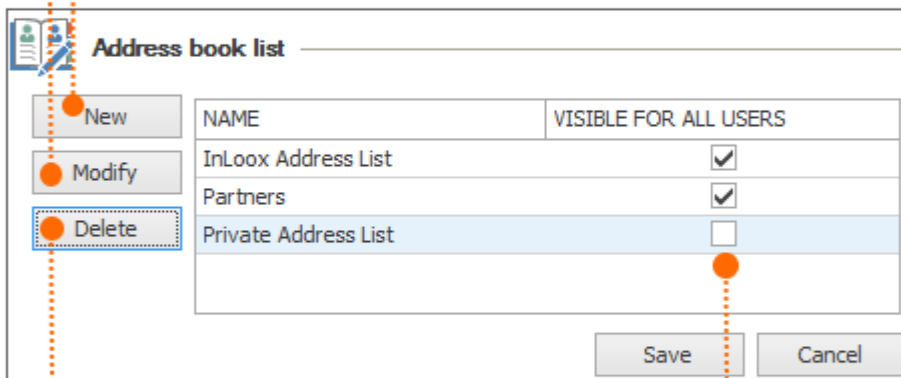


Create, edit and delete address books

1. Go to the InLoox contact management by clicking on **People** on the **InLoox now** or **InLoox PM** tab.
2. To manage your address books click on the **Address Book** icon on the **Start** tab. In the drop-down-list click on **Manage Address Books**. A new window will open:

Select an address book and click on Modify to change the name.

Click on New to create a new address book. Enter a name and choose whether it should be visible for all users or not.



Select an address book and click on Delete to delete it.

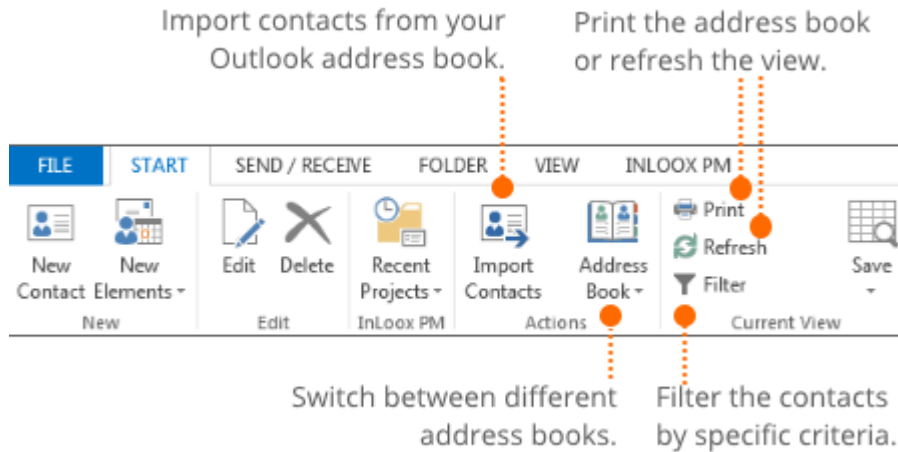
Change the visibility of each address book by ticking the check box.

3. To save your changes, click on **Save**.

Features in the address book view

Go to the InLoox contact management by clicking on **People** on the **InLoox now** or **InLoox PM** tab.

The address book view provides some helpful features on the **Start** tab.



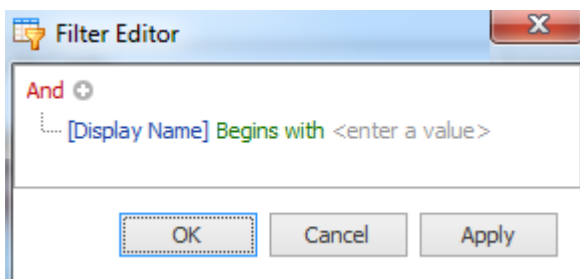
Import contacts from Outlook

By using this feature you can import contacts from your Outlook address book to your InLoox address book.

1. Click on **Import Contacts** on the **Start** tab.
2. Your Outlook address book pops-up and you can select the needed contacts by double-clicking.
3. When you are finished, click on **OK**.
4. All data that is connected to the selected contacts will be transferred automatically to InLoox. Now you can access the imported contacts from your InLoox address book.

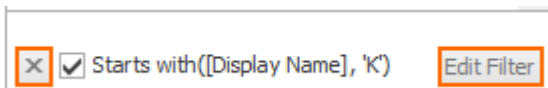
Filter contacts

You can search your contacts by using individual filters. This is very helpful when you are searching for a specific contact without remembering the full name. Therefore click on the **Filter** icon in the **Start** ribbon. A new window will open where you can edit the filter.



1. Click on the blue text (here „Display Name”), to filter by a specific criteria. You can use the following criteria: Display Address, Display Name, Email, Mobile, and Telephone.

2. Choose a condition by clicking on the green text (here „Begins with“). You can use many different conditions, like for example “Begins with”, “Equals”, “Contains” or “Ends with”.
3. Enter a value for the chosen criteria (here “K”), by clicking on the grey text “<enter a value>”.
4. For adding more filter criteria click on the plus icon next to the red „And“. Afterwards, edit the logical operator that is used for connecting several criteria, by clicking on the red “And”. Choose between: and, or, not and, not or.
5. Afterwards, click on **Ok** to scan your contacts with your individual filter. The results will be shown.
6. To edit the filter click on **Edit filter** below your results. To remove the filter click on the “X”-icon below your results.



Search contacts

In the right corner above your contacts you will find the feature **Search contacts**. With this feature you can easily search your contacts without creating a filter. Just enter some contact information to search for a specific person or e.g. for all contacts from San Francisco.

1. Enter some contact information in the field **Search contacts** and press enter or click on the loupe icon.
2. The results will be shown immediately. To exit the search click on the “X”-icon next to the search field.

Manage InLoox users

You can use the contact feature to add extern users like partners or freelancers to your InLoox database. Especially, when you are using InLoox now!, you need the InLoox contact management to add new users to InLoox. Furthermore we offer a new log on option to InLoox Web App for Office 365 users.

Add extern users to InLoox

Extern users, who are not working via the Outlook-Login with InLoox, can be added to the database by using the InLoox contact feature. This features helps to give partners, customers or freelancer access to a specific InLoox project.

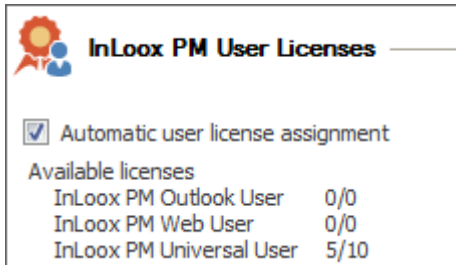
You can add extern users to **InLoox PM** or **InLoox now** by creating a new contact and assigning an InLoox user license.

Requirements:

- You are InLoox Admin.
- You have an unused InLoox user license.
- You have activated the automatic assignment of user licenses in the InLoox options.

How to activate the automatic user license assignment

1. Open the InLoox options to activate the automatic user license assignment. Therefore click on **File** and then on **InLoox PM** or **InLoox now** options.
2. In the InLoox options click on **License Key** and then on **User Licenses**. This area provides an overview over all available user licenses: InLoox PM Outlook User, InLoox PM Web User, and InLoox PM Universal User.

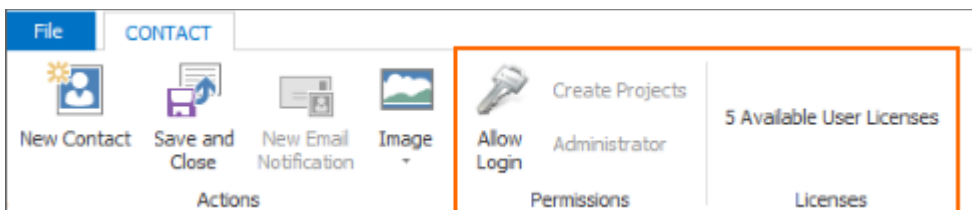


3. Put a check at the field **Automatic user license assignment**.
4. Afterwards, click on **Apply** and **OK** to save your changes and to close the InLoox options.

Assign InLoox user licenses to extern users

To assign an InLoox user license to an extern user, you have to create a new InLoox contact or you just open the already existing InLoox contact. Go to the InLoox **People** area to create a new contact or to open the already existing contact.

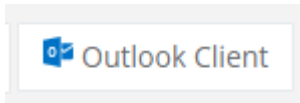
1. Open the **InLoox now** or **InLoox PM** tab and click on **People**.
2. If the person is already in your InLoox address book, just double-click on the contact to open it. Otherwise click on **New Contact** to create a new contact.
3. A new window opens. Here you enter all important contact details (see chapter Create a new contact). If the contact is already in your address book, you can skip this step.
4. In the **Licenses** area in the ribbon you can see how many unused user licenses are left.



5. Click on the button **Allow Login** to add the person to InLoox and to assign a user license. If the person should be allowed to create projects by themselves, activate the button **Create Projects**. If you want to assign all writing- and reading permissions to this contact, click on **Administrator** (the contact is now an InLoox administrator).
6. To save your changes click on **Save and Close**. Now, the contact automatically receives its InLoox user license. Additionally, you can edit the persons' user-based permissions in the InLoox options. For more information see Set user permissions.

7. The following procedure differs between InLoox now and InLoox PM.

7.1 InLoox now: The user receives an invitation mail to InLoox now!. He clicks on the attached link and is forwarded to InLoox Web App. There he creates a password and logs-on to InLoox Web App. Afterwards, he can click on the button **Outlook Client** in the Web App to download the local InLoox client.



7.2 InLoox PM: The new user won't receive an invitation mail. You have to create an authentication for him in the InLoox options:

- Therefore click on **File** and open the **InLoox PM** options.
- Click on **Permissions** and select the new user in the user-based permissions. Then click on **Edit**.
- A new window will open. In the **Authentication** area you can create the authentication for the new user. Afterwards you click on **OK** to close the window. To save your changes and close the InLoox options click on **Apply** and **OK**.

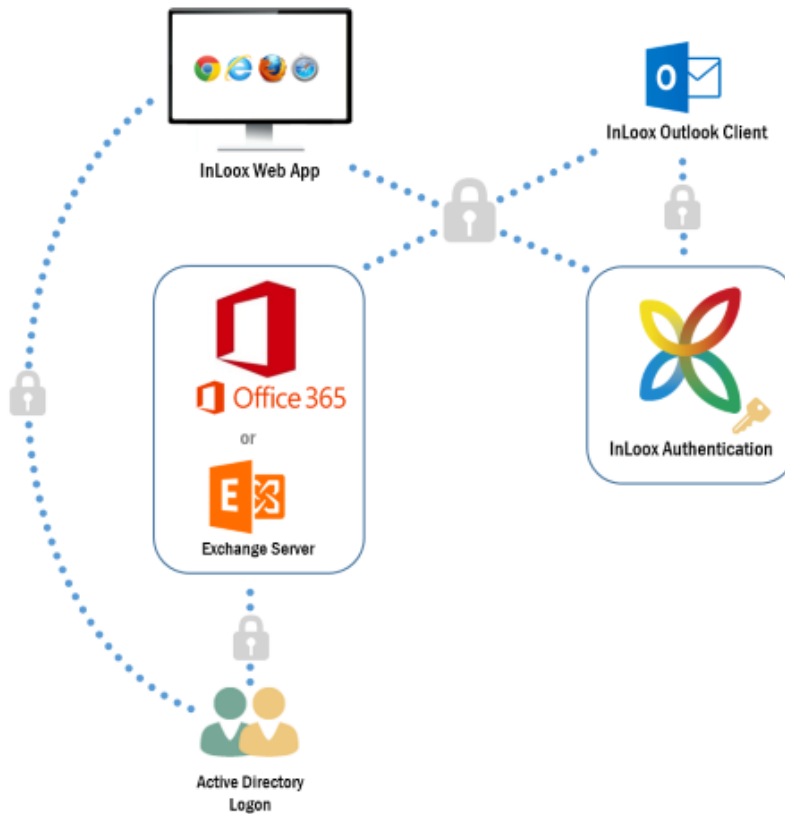
 The screenshot shows a web interface for user management. At the top, there is a section titled "User / Role" with a blue user icon. Below this, a text box contains the name "Joel Somers" and a dropdown menu. The main section is titled "Authentication" with a yellow key icon. It contains three input fields: "User name:" with the value "joel.somers@inbound.plus", "Password:" with a masked field of dots, and "Re-enter password:" with a masked field of dots. At the bottom, there are two checkboxes: "Change password on next log-on" and "Account inactive", both of which are currently unchecked.

Additional log on option to InLoox Web App for Office 365 users

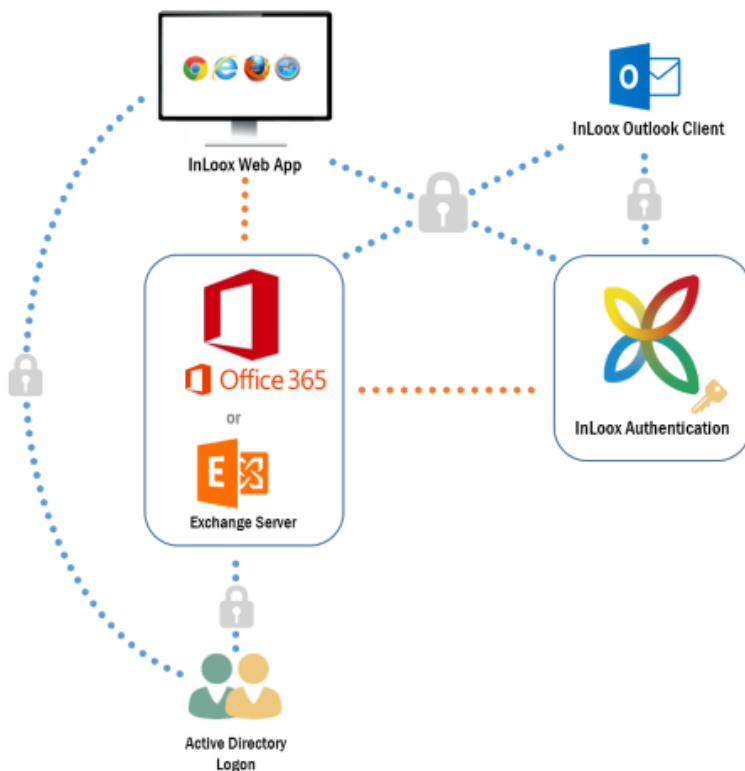
Since InLoox 9 you don't need a VPN for working with InLoox. Now you have the possibility to access the database via InLoox Web App with your local installed Outlook Client.

Requirements: Outlook Client as well as InLoox Web App at least in version 9.0.10. If you're using InLoox now! then InLoox Web App will automatically be up-to-date and you only need to check the current version of your Outlook client.

So far, you had the following possibilities to log on to the InLoox Outlook Client and InLoox Web App:

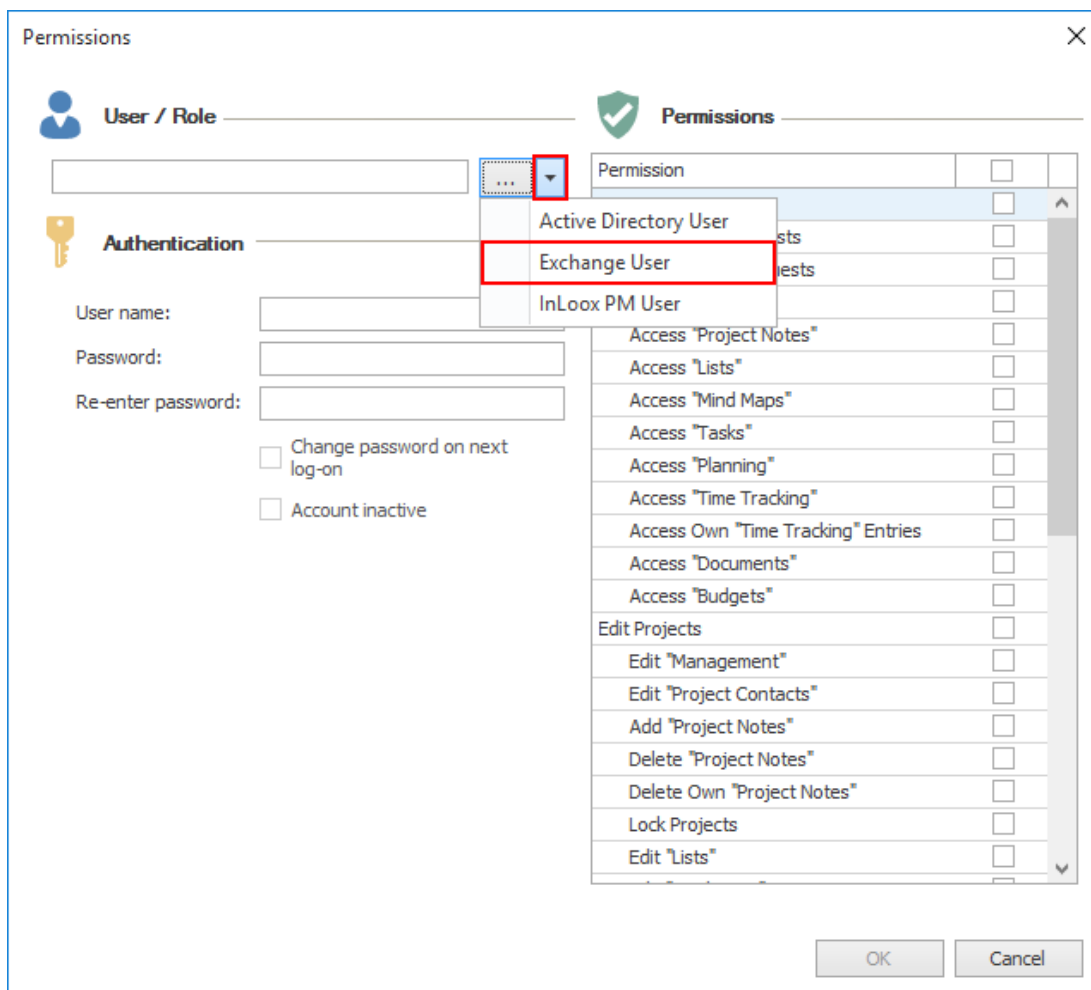


If you use an Office 365 account in Outlook and log on to InLoox with “Outlook Login”, you won’t be able to use the login to log on to InLoox Web App. InLoox 9.0.9 offers you another authentication method to log on to InLoox Web App with an Office 365 account: You can add an additional InLoox authentication to your Office 365 user account. You can then use this authentication to log on to InLoox Web App. This enables you to use the same Office 365 user account for InLoox for Outlook and InLoox Web App.



Follow these steps to set up the authentication:

1. Navigate to the InLoox Options: File >> InLoox Options
2. Go to Permissions.
3. Choose the Office 365 user from the list User-based permissions. You can also create a new user account if it does not exist yet:
 - Click on New.
 - Open the context menu and select Exchange User.



- Select your Office 365 contact from your global address book, then close the address book with **OK**.

4. Now select InLoox PM **authentication** in the permissions dialog and set a password.

Permissions

User / Role Rita Meyer

Authentication

InLoox PM Authentication

User name: rita.meyer@inloox.com

Password: ●●●●●●

Re-enter password: ●●●●●●

Change password on next log-on

Account inactive

Permissions

Permission	<input type="checkbox"/>
Create Projects	<input type="checkbox"/>
Create Project Requests	<input type="checkbox"/>
Approve Project Requests	<input type="checkbox"/>
Access Projects	<input type="checkbox"/>
Access "Project Notes"	<input type="checkbox"/>
Access "Lists"	<input type="checkbox"/>
Access "Mind Maps"	<input type="checkbox"/>
Access "Tasks"	<input type="checkbox"/>
Access "Planning"	<input type="checkbox"/>
Access "Time Tracking"	<input type="checkbox"/>
Access Own "Time Tracking" Entries	<input type="checkbox"/>
Access "Documents"	<input type="checkbox"/>
Access "Budgets"	<input type="checkbox"/>
Edit Projects	<input type="checkbox"/>
Edit "Management"	<input type="checkbox"/>
Edit "Project Contacts"	<input type="checkbox"/>
Add "Project Notes"	<input type="checkbox"/>
Delete "Project Notes"	<input type="checkbox"/>
Delete Own "Project Notes"	<input type="checkbox"/>
Lock Projects	<input type="checkbox"/>
Edit "Lists"	<input type="checkbox"/>

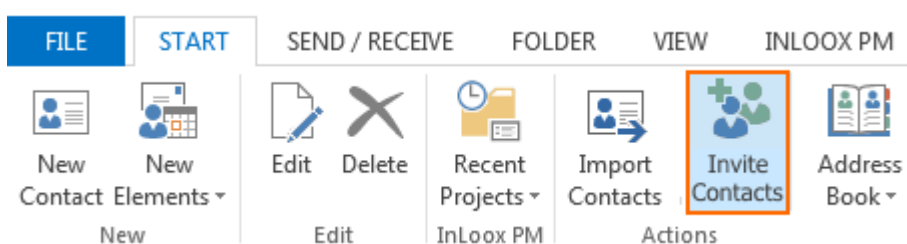
OK Cancel

5. Click on **OK** to confirm.
6. Click on **OK** to save and close the InLoox Options.
7. Now you can log on to InLoox Web App with your email address and the assigned password.

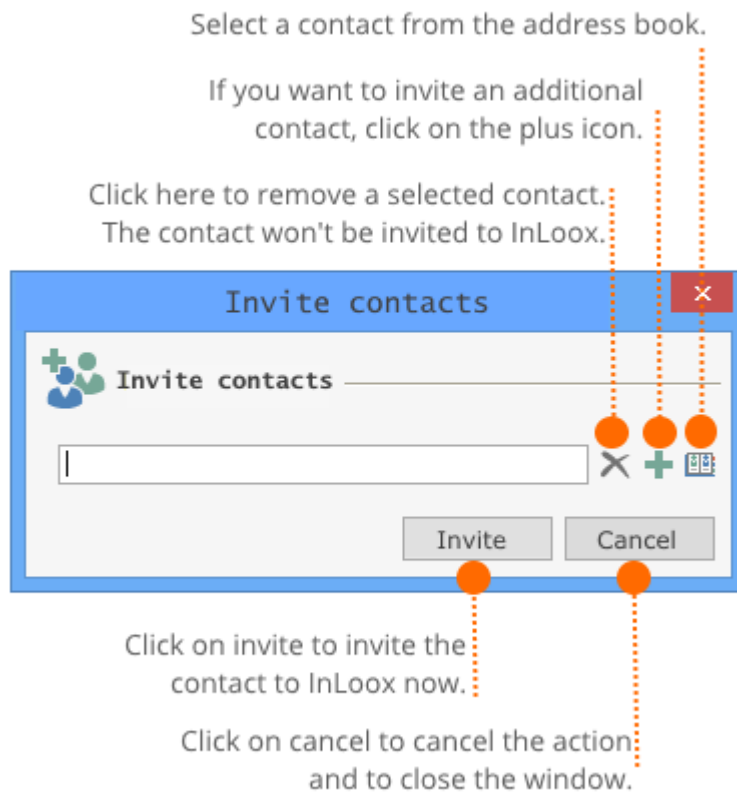
Invite new users to InLoox now!

Since InLoox 9 the contact management tool offers the possibility to directly invite new users to InLoox now!. Therefore, proceed as follows: (Start from your inbox)

1. Open the **InLoox now** tab and click on **People**. The InLoox address list opens and gives an overview over all contacts.
2. Click on **Invite Contacts** on the **Start** tab.



3. A new window for selecting the contacts will open.



4. The selected contact will receive an invitation mail for InLoox now!.

Project list

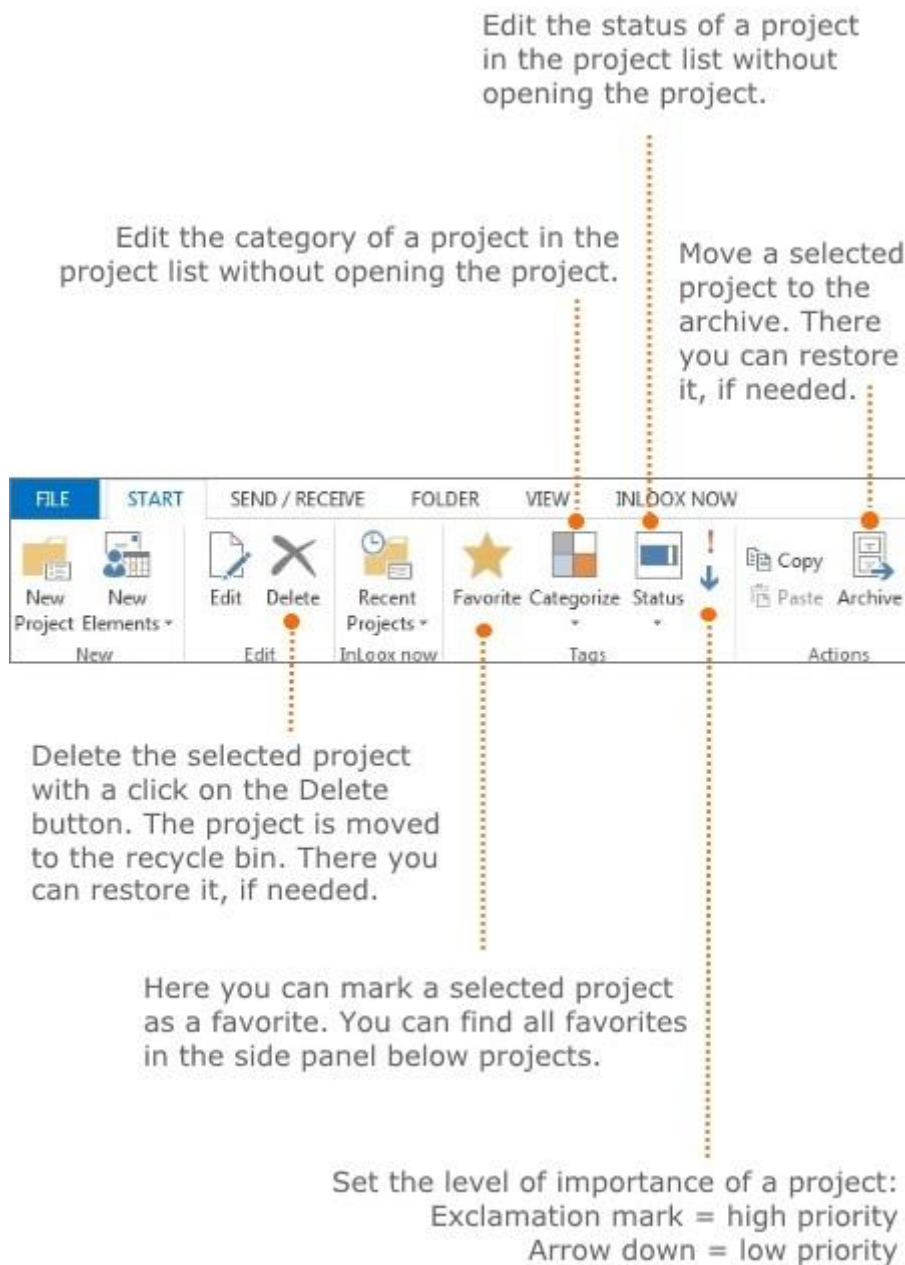
The project list provides you with a brief overview of all your projects. It includes various features that make project editing easier and faster. As a standard, you can see only those projects in the list that are accessible for you.

Selected project list features

To access the project list click on the **InLoox PM** or **InLoox now** tab. Click on **Projects** in the Outlook ribbon afterwards.

1. Features in the InLoox PM or InLoox now Ribbon

On the **Start** tab, in the InLoox PM or InLoox now Ribbon you can find additional features that simplify your work within the project list:



Admins can individually define both, [categories](#) as well as different specifications of the [status](#), in the InLoox options.

2. How to open or create a project

Open a project

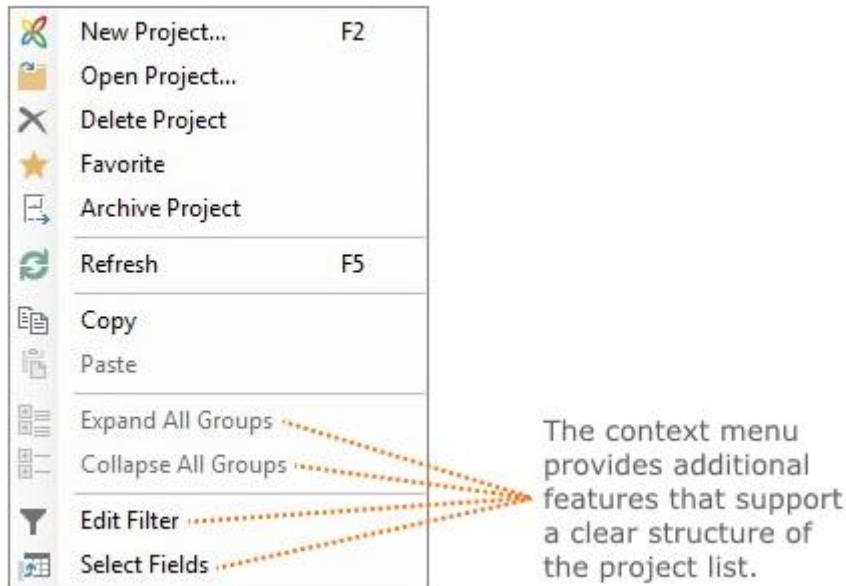
Double click on a project in the project list or right click on the project to open the context menu. Then choose **Open Project** from the menu.

Create a project

Double click on an empty space in the project list or right click to open the context menu. Then choose **New Project** from the menu.

3. The context menu and useful keyboard shortcuts

The context menu provides you with almost all basic features that are also available on the InLoox Ribbon. To open the context menu right-click on the project list.



For more information on how to structure the project list see [Create and edit custom view](#).

Useful keyboard shortcuts

- **F2** – Create a new project.
- **F4** – Refresh the project list.
- **CTRL+P** – Print the project list.
- **CTRL+C** – Copy a project into the clipboard.
- **CTRL+V** – Paste a project from the clipboard to the project list.

Conditional formatting as a warning system

By applying the conditional formatting to your project list, you can quickly highlight project information that meets certain conditions. This feature can be very useful:

- As a warning system for the project controlling of critical projects
- To clearly structure the project list

The conditional formatting dropdown-menu provides you with preconfigured formatting templates and your individual formatting drafts. To delete a draft choose the formatting in the dropdown-menu and click on **Remove Formatting**.

Add Simple Formatting

The simple formatting compares the value of a field with a pre-defined reference value. In the following example all projects whose actual expenses exceed a specified value will be marked red.

1. Let's start from the project list. Click on **Conditional Formatting** in the **start** tab.
2. Select **Add Simple Formatting** in the dropdown-menu. A side panel will open on the right side. There you can define the formatting.
3. Choose **Total Expenses (Actual)** in the **Column** field.
4. Choose the argument **Greater than** in the **Condition** field.
5. Enter the reference value 5,000 in the **Value 1** field.
6. Define the formatting in the **Format** area, e.g. **BackColor** red. Activate the check box **Apply for cell** in order to format the whole cell of the project in the project list. All projects whose total expenses exceed 5,000 will be marked with red in the project list.


The screenshot shows the 'Condition' dialog box with the following settings:

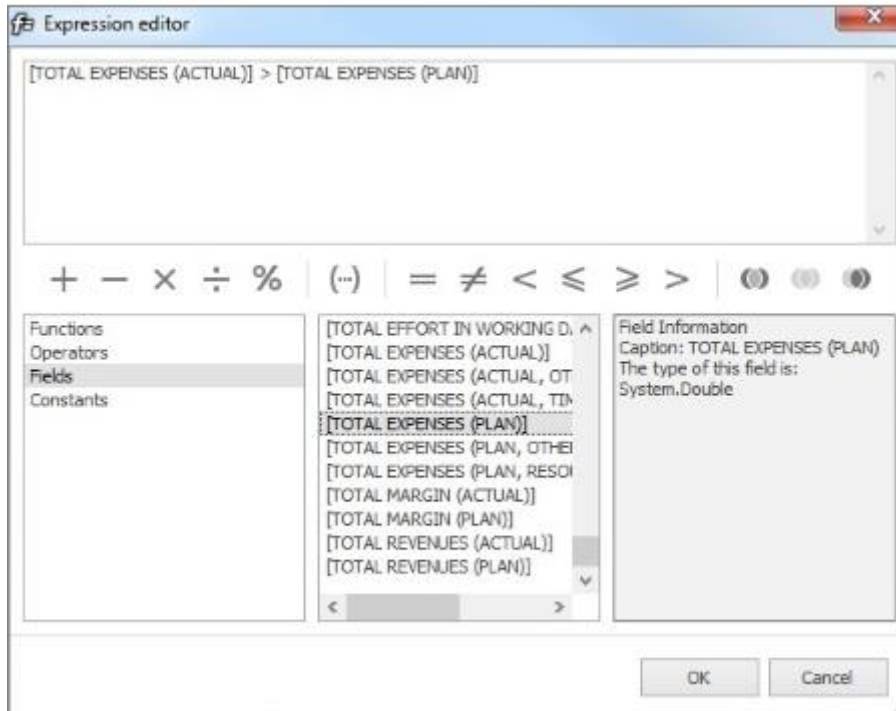
- Column:** [TOTAL EXPENSES (ACTUAL)]
- Condition:** Greater
- Value 1:** 5,000.
- Format:**
 - Apply to row
 - Misc:**
 - BackColor:** Red
 - BackColor2:
 - BorderColor:
 - Font: Tahoma, 8.25pt
 - FontSizeDelta: 0
 - FontStyleDelta: Regular
 - ForeColor:
 - GradientMode: Horizontal
 - Image: (none)
 - Options: **UseBackColor = True**
 - TextOptions:

Add Extended Formatting

Extended formatting allows the calculation of a value and compares it with a pre-defined reference value. For those calculations you can use more than one field as a variable. The following example will examine, if a projects' actual expenses exceed the planned expenses.

1. Let's start from the project list. Click on **Conditional Formatting** in the **start** tab.
2. Select **Add Extended Formatting** in the dropdown-menu. A side panel will open on the right side. There you can define the formatting.

3. Click on the following icon  on the side panel. Thereby you open the dialog box **Expression editor** for specifying the formula and calculating field values.
4. Click on **Fields** in the left column.
5. Select **Total Expenses (Actual)** in the middle column by double-clicking.
6. Select the relational operator greater than >.
7. Select **Total Expenses (Plan)** in the middle column by double-clicking. Afterwards click on **Ok**.

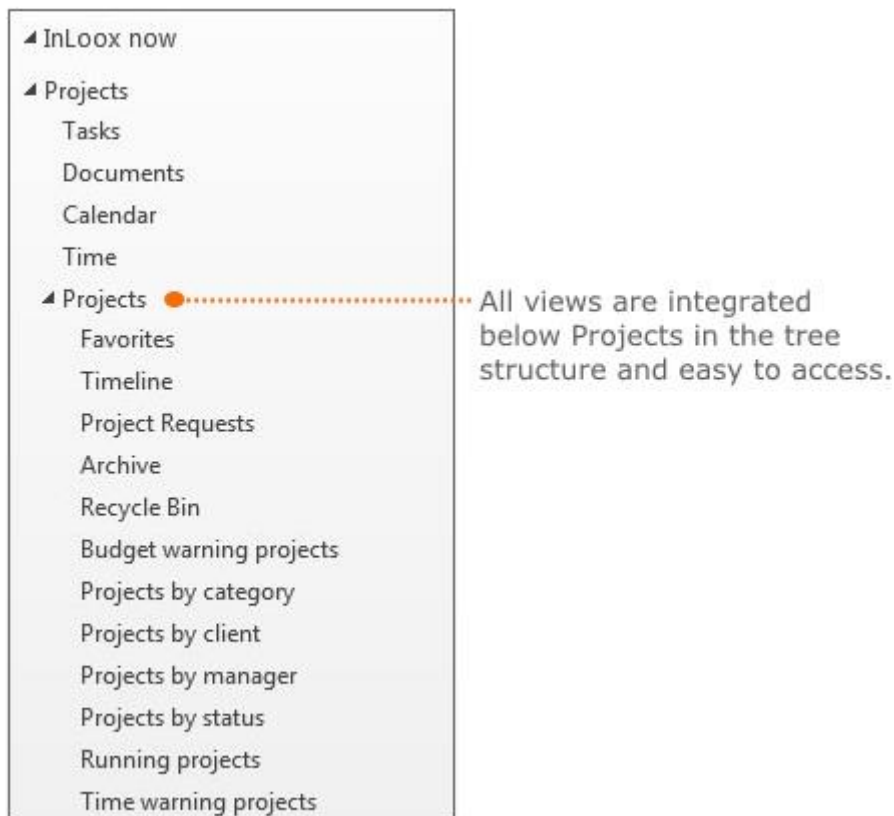


8. You can define the formatting in the **Format** area in the same way as when using simple formatting. Activate the check box **Apply for cell** in order to format the whole cell of the project in the project list.
9. All projects which meet the defined conditions will be marked in the project list.

★	!	🕒	📄	NUMBER	PROJECT NAME
	!			2016-0002	Product Engineering Process
★			!	2016-0004	Product Brochure
★			!	2016-0001	Exhibition
★			!	2016-0003	Commercial Construction Demo Project

The tree structure in the project list

When you are opening the project list you can find the tree structure on the left part of the window (required: Outlook folder structure on the left side is open). The tree structure provides you with additional views like Favorites, Project Requests, Archive and Recycle Bin.



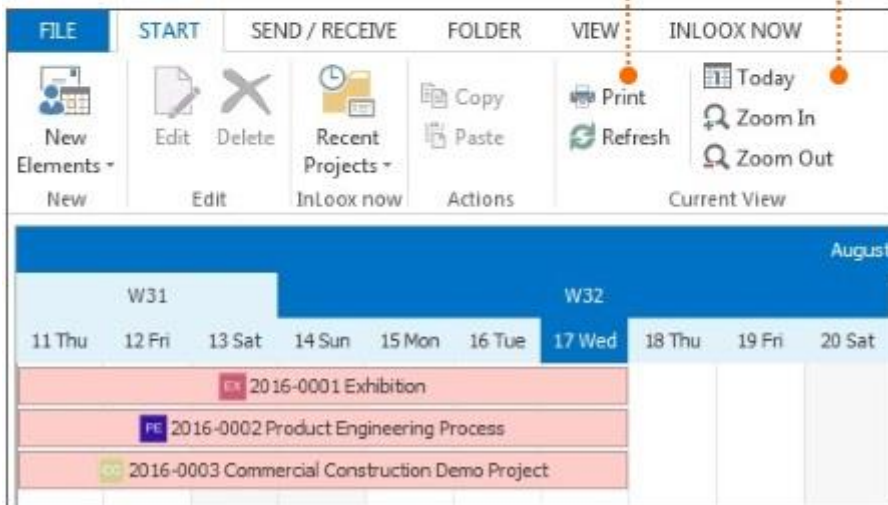
In the following we will shortly introduce the Timeline and Trash view.

Timeline

The Timeline provides you with an overview of the chronological allocation of all your projects.

Click on Zoom In or Zoom Out to adjust the timeline to your needs.
Click on Today to switch to the current date.

Here you can quickly print the timeline.



Those features are also available in the context menu. Right-click in the timeline to open the context menu. For more information about printing, see [Print the project list](#).

In the timeline projects can be differentiated by their color. The coloring scheme is predetermined and cannot be changed individually:

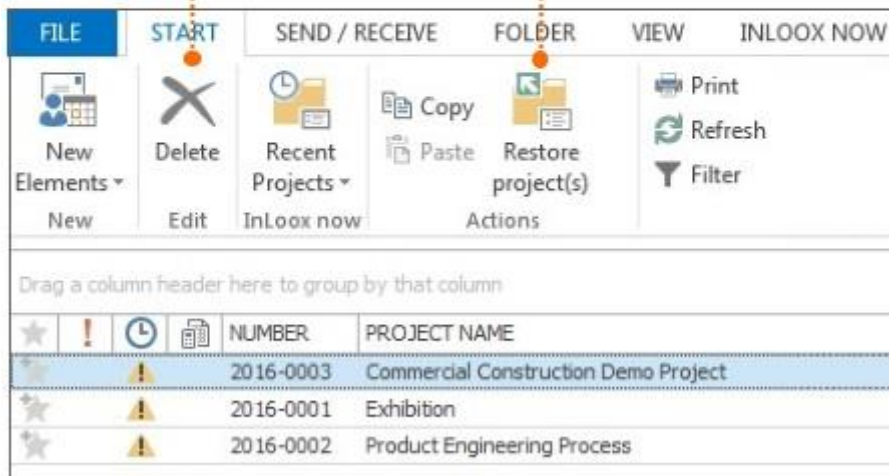
Color	Meaning
<input type="checkbox"/> White	Completed projects
<input type="checkbox"/> Red	Overdue projects
<input type="checkbox"/> Green	My projects
<input type="checkbox"/> Blue	All other uncategorized projects

Recycle Bin

The Recycle Bin shows all projects that you have deleted in the project list.

Click on Delete to permanently remove a selected project.

Click on Restore project(s) to restore a project you have accidentally deleted.

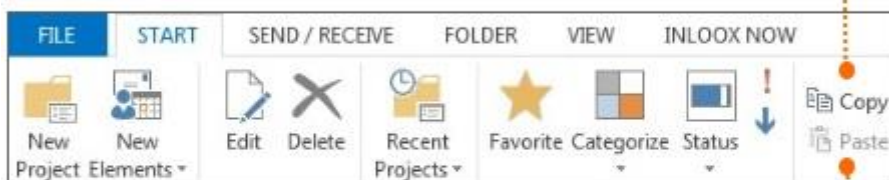


How to duplicate a project

You can duplicate entire projects from your project list. This is very useful, when you want to create a new project that is extremely similar to an already existing project. Below you can find our how-to instructions.

1. Click on **Projects** in the **InLoox PM** or **InLoox now** tab to open the project list.
2. Select the project you want to copy ...

... and click on Copy.



Afterwards click on Paste to paste the project to the project list.

Useful keyboard shortcuts

- **CTRL+G** – Copy the selected project from the project list.
- **CTRL+V** – Paste the selected project to the project list.

3. To edit the copied project you have to assign a new project number. Afterwards you can adapt the project information.

Print the project list

InLoox provides a print feature for every project view as well as for the project pages - all printing settings and features can be found in the dialog box print. You can use it to modify a document's print settings, or specify its watermark settings.

Click on **Print** in the **start** tab to open the print preview. The following screenshot explains all important features that you can use to edit the print preview. To guarantee the ideal print of your document click on **Scale** and choose a suitable percentage from the drop-down menu. The scale feature enlarges or reduces the document in percentage to its current size.

Click on Quick Print to print a document using default settings. If you want to edit the settings before, click on Print.

Specify page margins and choose whether to print in landscape or portrait orientation. Additionally, you can change the paper size.

Change the page color and create a watermark. Enter the text in the watermark dialog box or choose one of the provided options.

Within the options you can edit the preview and its components.

Search for a specific text.

Export the preview to save it as a file on your hard drive or to send it as an E-Mail attachment.

Insert page header or page footer into printed documents.

Use the hand tool to scroll content by dragging the document instead of using scrollbars.

VOR	OR	WA	T	W	NUMBER	PROJECT NAME	MANAGER	CUSTOMER	OBJECT	OBJECT E	ANNED	STA	LANNED	EN
<input type="checkbox"/>					2016-0	Commercial Construction Demo P	John Doe	Intern	8/11/2	8/16/2	8/11/2016	2/16/2017		
<input type="checkbox"/>					2016-0	Exhibition	John Doe	Intern	8/11/2	8/16/2	8/11/2016	9/21/2016		
<input type="checkbox"/>					2016-0	Product Brochure	rita.meyer	TradeFair	9/12/2	9/29/2	9/12/2016	9/18/2016		

Search and filter projects

The project list offers you several options to find a project you are looking for. This chapter shows how to use the **search function** and **filters** when searching a project.

Search function

1. To open the project list click on **Projects** in the **InLoox PM** or **InLoox now** tab.
2. Click on the **Search projects** box above the project list.

Enter the project name or further information that is saved in the project you are looking for. Afterwards click on the magnifying glass or push enter.



Search projects							
Drag a column header here to group by that column							
★	!	🕒	🗑️	NUMBER	PROJECT NAME	PROJECT ST...	PROJECT END
★	!	🕒	🗑️	2016-0003	Commercial Construction Demo Project	8/11/2016	8/16/2016
★	!	🕒	🗑️	2016-0001	Exhibition	8/11/2016	8/16/2016
★	!	🕒	🗑️	2016-0004	Product Brochure	9/12/2016	9/29/2016
★	!	🕒	🗑️	2016-0002	Product Engineering Process	8/11/2016	8/16/2016

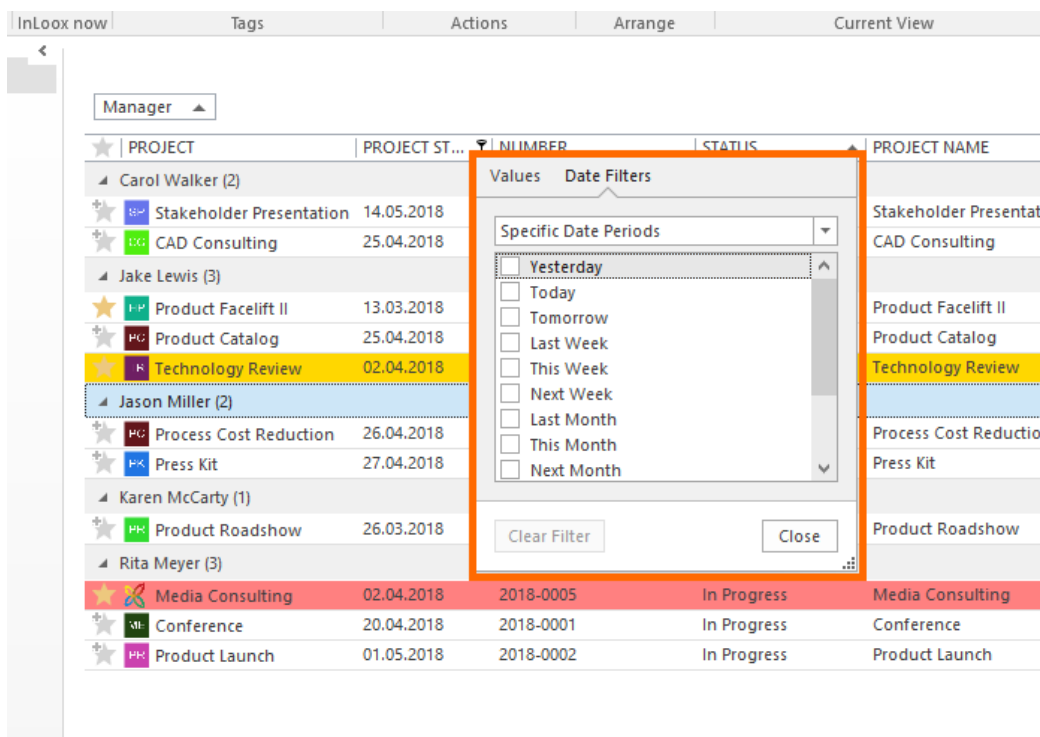
3. All projects that include the entered text are shown. The search results are accessible on a side panel, even when you are opening a project.

4. When you are finished close the search function by clicking on the **X** next to the **Search projects** box.

Quick filters

With the new Excel-style quick filters, you can now refine your search in table views even more easily. Depending on the field type, extended text and date filters are available. For example, you can filter your project or task list by different date ranges:

Click on the **funnel icon**, which will appear if you mouse-over a column header. Then select the **Date Filters** tab.

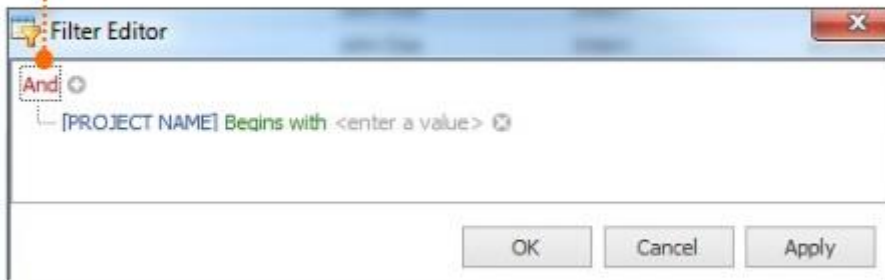


PROJECT	PROJECT ST...	NUMBER	STATUS	PROJECT NAME
Carol Walker (2)				
★ Stakeholder Presentation	14.05.2018			Stakeholder Presentat
★ CAD Consulting	25.04.2018			CAD Consulting
Jake Lewis (3)				
★ Product Facelift II	13.03.2018			Product Facelift II
★ Product Catalog	25.04.2018			Product Catalog
★ Technology Review	02.04.2018			Technology Review
Jason Miller (2)				
★ Process Cost Reduction	26.04.2018			Process Cost Reductio
★ Press Kit	27.04.2018			Press Kit
Karen McCarty (1)				
★ Product Roadshow	26.03.2018			Product Roadshow
Rita Meyer (3)				
★ Media Consulting	02.04.2018	2018-0005	In Progress	Media Consulting
★ Conference	20.04.2018	2018-0001	In Progress	Conference
★ Product Launch	01.05.2018	2018-0002	In Progress	Product Launch

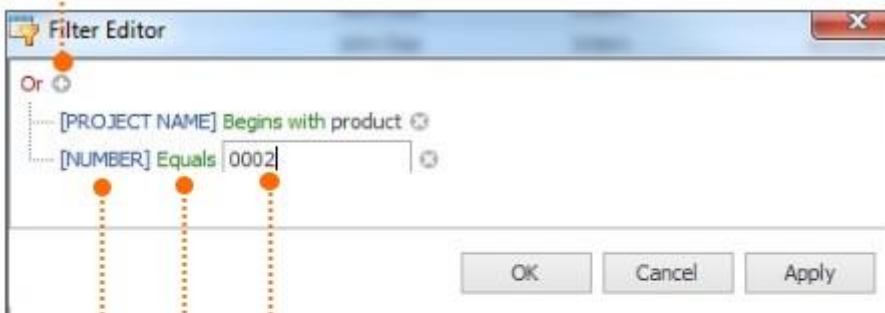
How to filter the project list [advanced]

1. To open the project list click on **Projects** in the **InLoox PM** or **InLoox now** tab.
2. Click on **Filter** in the **start** tab.
3. Create a filter criteria.

Click on And to select a comparative operator.



Click on the plus symbol to create additional criteria.



Enter information behind the operator.

Click on Equals to change the logical operator.

Click on the condition field Number to select another field.

4. Click on **Ok**. InLoox shows all projects that meet your criteria.

Project planning

Creating a Project Plan with InLoox

With InLoox, you create Gantt-Charts for your project planning. Such a Gantt-Chart consists of milestones, specific points in a project timeline, and activities, which are scheduled phases in a project with a specific start and end date. Several activities can be combined to form a summary

activity. Activities usually comprise of one or more tasks that need to be done in order to complete the activity.

Please, watch our [video tutorial](#) for an introduction into project planning with InLoox.

This is how you can create a project plan with InLoox:

1. Adopt planning elements from a project mind map.
2. Import an InLoox planning template or a Microsoft Project® planning template.
3. Copy and paste planning elements from an Excel-file.
4. Or create the project plan manually, described as follows.

ATTENTION You can only create an InLoox project plan if you have the necessary permissions. You need to have permissions to **Edit Projects** and to **Edit “Planning”**. If you only have permission to **Access Projects** and **Access “Planning”**, you are unable to create a project plan. Learn more about permissions here.

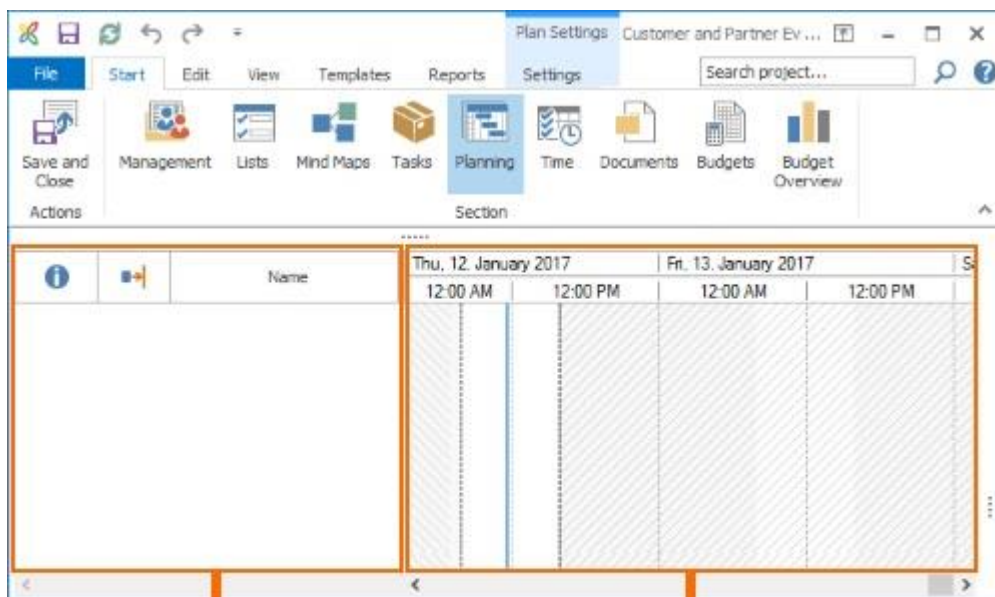
Create, edit, and delete new planning elements – activities and milestones

The following steps guide you through creating a new project Gantt-Chart with InLoox.

Create new activities and milestones

1. Open Outlook and click on the tab **InLoox PM** or **InLoox now**.
2. Click in the ribbon on the **Start** tab and click on **Projects**. Create a new project or select an existing project.
3. Click on the tab **Start** and in the ribbon on **Planning**.

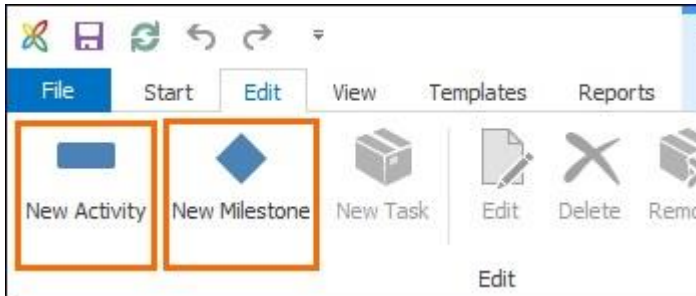
The InLoox project plan consists of the planning list on the left, where you see the two fields *Info* and *Name* when you first open the InLoox planning, and the Gantt-Chart in the calendar view on the right.



planning list with fields

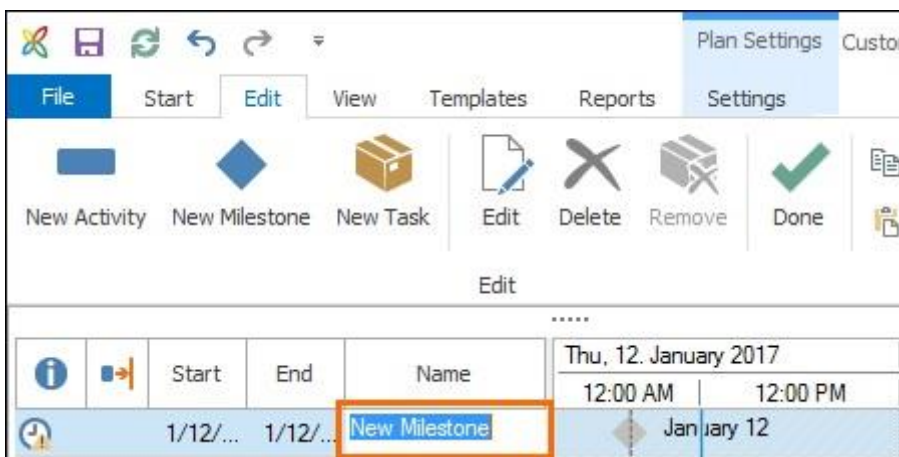
Gantt-chart in the calendar view

Click on the tab **Edit**. Then click on **New Activity** or **New Milestone** to create one of these new planning elements. You can also use the short cuts Ctrl+N (or Cmd+N) for a new activity or Ctrl+M (or Cmd+M) for a new milestone.



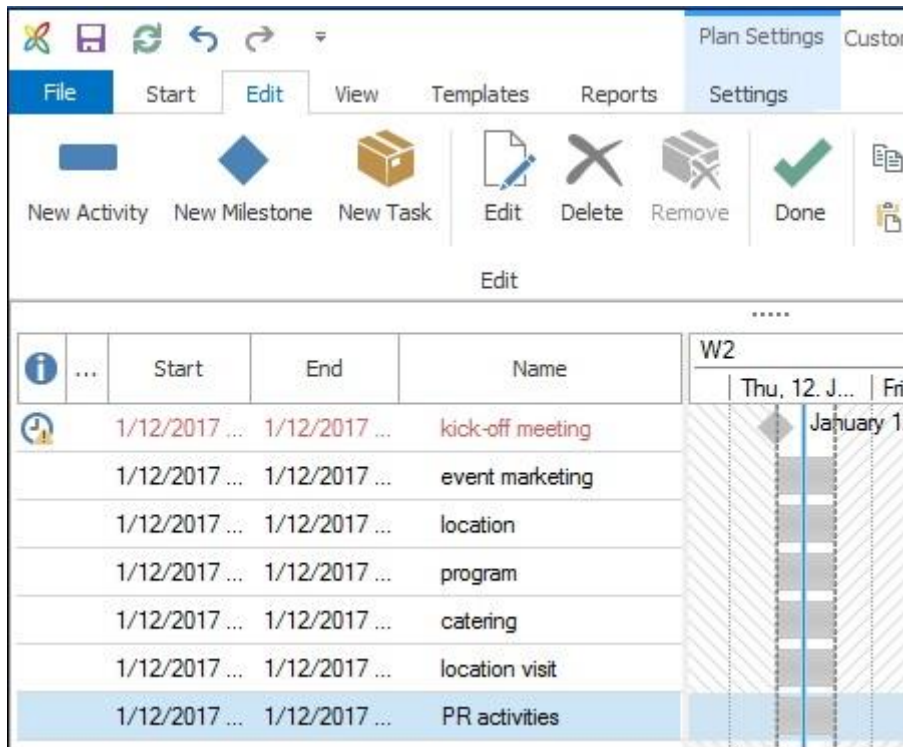
The new planning elements are visualized in the Gantt-Chart. Activities are shown as bars and milestones are diamond shaped. If you want to create a new milestone:


1. Click on the tab **Edit**, and then click on **New Milestone** or press Ctrl+M (or Cmd+M).
2. You see the **New Milestone** in the planning list. Give it a new name, e.g. “Kick-off meeting”. Press ENTER to save.



If you want to create a new activity, do the same, only click on **New Activity** in the ribbon or press Ctrl+N.

ATTENTION If you do not schedule these newly created planning elements (i.e. you have not set a start and/or end date) right away, InLoox will use the creation date of the project for milestones. Activities will also start at the creation date of the project and will be given a duration of one day (with a default setting of 8 work hours). Your newly created project plan will then look e.g. like this:



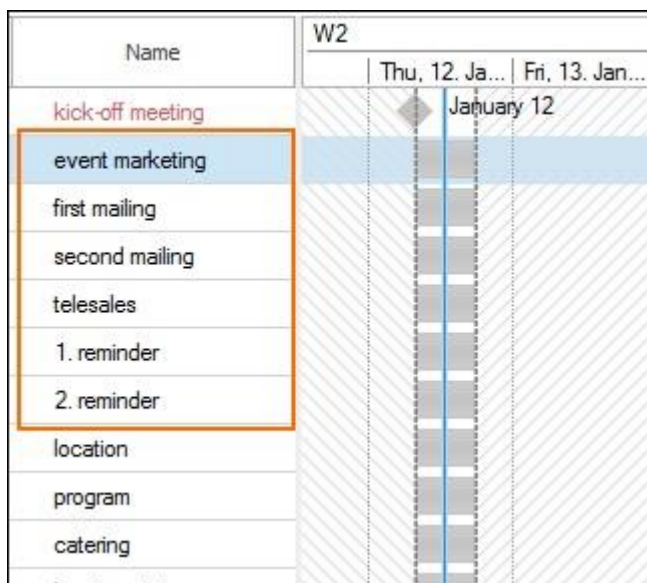
Each planning element starts and ends at the same time. No dependencies have yet been established between the planning elements. As each planning element's start date lies in the past, they are all highlighted in red and are marked as overdue by the symbol  in the info column.

Create summary activities

If you combine several activities which are logically connected and need to be finished within the same time frame, you create a summary activity.

Proceed as follows:

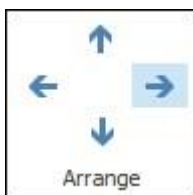
1. Create all those activities, that you want to combine, e.g. all marketing activities.



2. Mark each of the activities by pressing Ctrl and clicking on each planning element. In this example, “event marketing” is supposed to become the summary activity.

Name	W2	
	Thu, 12. Ja...	Fri, 13. Jan...
kick-off meeting	January 12	
event marketing		
first mailing		
second mailing		
telesales		
1. reminder		
2. reminder		
location		
program		
catering		
location visit		


3. Then click in the ribbon on **Edit** and click on the right arrow in the section **Arrange**. The individual activities are now indented.

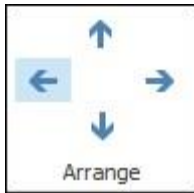


4. The summary activity “event marketing” is visualized in the Gantt-chart as a summary bar. If you click on the arrow next to the summary event’s name you can collapse the subordinate activities.

Name	W2	
	Thu, 12. Ja...	Fri, 13. Jan...
kick-off meeting	January 12	
▲ event marketing		
first mailing		
second mailing		
telesales		
1. reminder		
2. reminder		
location		
program		
catering		
location visit		

5. If you want to undo the creation of a summary activity, simply click on the undo icon in the upper

left hand corner  or mark all the subordinate activities of the summary activity and click on the left arrow in the ribbon in the section **Arrange**.



ATTENTION The duration of the summary activity is calculated based on the start and end dates of the subordinate activities. I.e. that a summary activity starts on the start date of the earliest subordinate activity and ends on the end date of the latest subordinate activity. If you change the start and/or end dates of the subordinate activities, the duration of the summary activity is automatically adjusted.

Delete planning elements

If you want to delete a planning element that you have just created, simply click on the undo symbol in the upper left-hand corner of the Outlook toolbar.



Otherwise, mark one or more planning elements you want to delete and click **Delete** in the tab **Edit**.



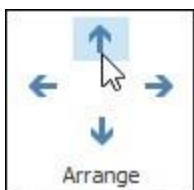
InLoox will ask you again, if you are sure you want to delete the planning element. Confirm by clicking **Yes**.

ATTENTION If you delete a summary activity, all subordinate activities are deleted as well.

Change the order of the planning elements

In order to change the order of the planning elements, proceed as follows:

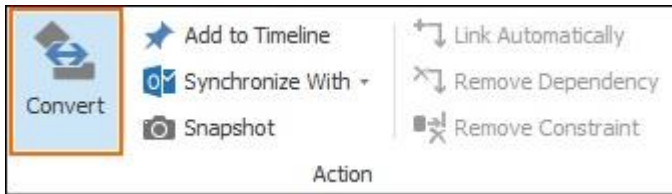
1. Click on the planning element that you want to move.
2. Open the tab **Edit** and use the arrows in the section **Arrange** to move the planning element up or down the list.



Convert planning elements: activity <-> milestone

If you want to convert an existing activity into a milestone or vice versa, you do not have to delete it and create a new one.

Click on the planning element, you want to convert and then open the tab **Edit** and click on **Convert** in the section **Action**.

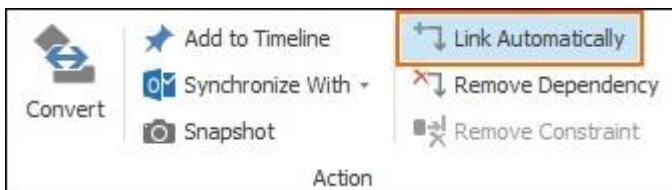


ATTENTION Summary activities cannot be converted.

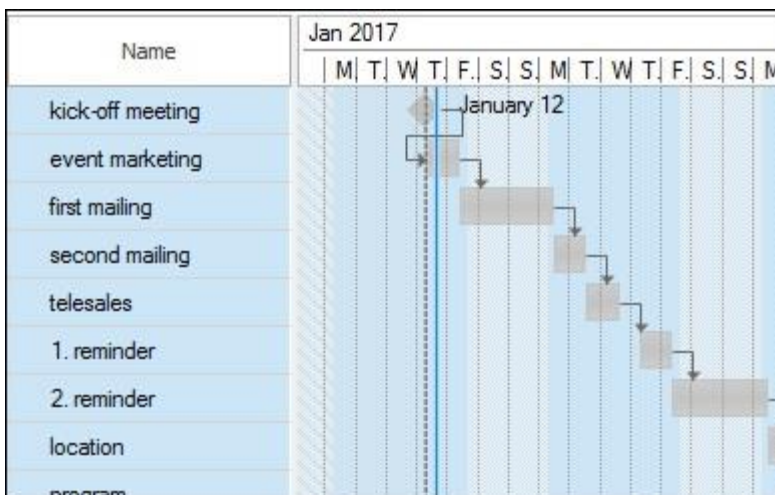
Link planning elements automatically

If you have created the planning elements in a chronological order, you can link them with just one click and create dependencies between the planning elements. That way, you create a project plan based on the waterfall model.

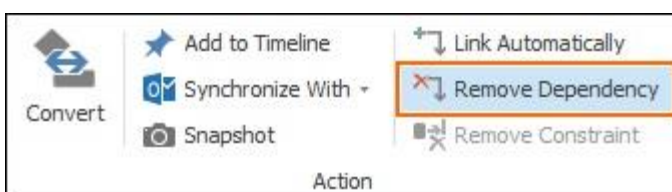
1. Click on the planning elements you want to link. Use Ctrl+A to mark every planning element in your plan.
2. Open the tab **Edit** and click on **Link Automatically** in the ribbon in the section **Action**.



3. The marked planning elements are now linked. Proceed to [edit the dependencies](#).



4. If you want to undo the automatically created dependencies, mark the planning elements whose link you want to undo and click on **Remove Dependency** in the tab **Edit** in the section **Action**.




Or click on the undo symbol in the Outlook tool bar in the upper left-hand corner.



Highlight planning elements

You can highlight planning elements by assigning them a flag or color. Click on the planning element you want to highlight, open the tab **Edit** and click on **Flag** or **Color** in the section **Highlight**.



TIPP In order to see flagged planning elements, display the field **Flag**  in the planning list.


Dependencies between planning elements

When you create dependencies, i.e. establish logical relationships between planning elements, you draw up a project schedule. To do that, you need to edit the planning elements and add details such as start and end date, duration, the type of dependency and, if necessary, set restrictions.

You can edit the planning elements in the planning list as well as in the Gantt-chart.

Create dependencies manually

In order to create dependencies, you have to link the planning elements. Dependencies can be established between all planning elements (activities, summary activities, milestones). You can do that either automatically, or manually, in your Gantt-chart, described as follows:

1. Move your mouse over the planning element until it turns into .
2. Now, click on the planning element and move the cursor to the other planning element to link them.

Name	Jan 2017	
	Thu, 12	Fri, 13
kick-off meeting	January 12	
event marketing		

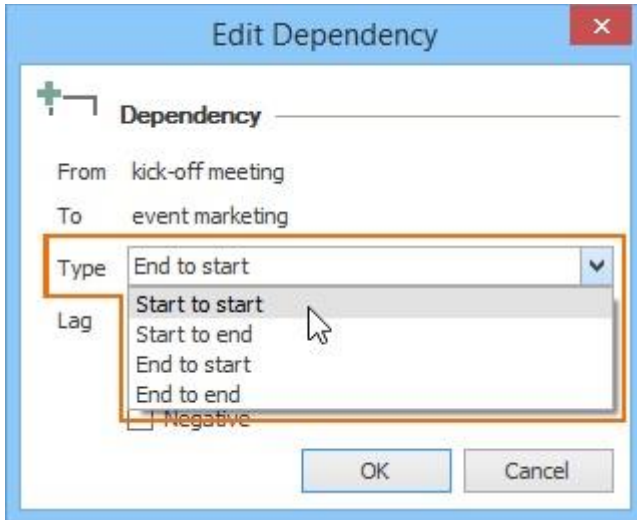
3. Let go of the cursor. The two planning elements are now linked. In the example below, the relationship is a so called *Finish-to-Start Dependency*: the activity “event marketing” is only to start after the milestone “kick-off meeting” is finished. That means, you have created a *Predecessor* (kick-off meeting) and a *Successor* (event marketing).

Name	Jan 2017	
	Thu, 12	Fri, 13
kick-off meeting	January 12	
event marketing		

Edit dependencies

To edit an existing dependency, double-click on the link between two planning elements in the Gantt-chart. The window **Edit Dependency** opens and you can now change the type of dependency.

Click on the field **Type** to select another type of dependency.



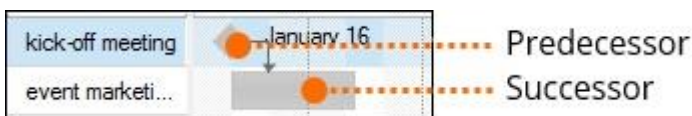
Overview: Types of dependencies

There are four different types of dependencies to link planning elements.

Finish-to-Start Dependency:

This type of dependency establishes a relationship between the end of the predecessor and the start of the successor. You ensure that the successor can only start upon completion of the predecessor.

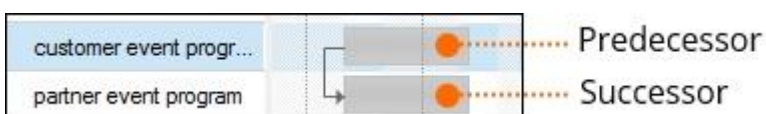
Example: The activity “event marketing” can only start once the milestone “kick-off meeting” has been successfully completed.



Start-to-Start Dependency:

This type of dependency restricts the start of the successor, as it can only start once the predecessor has started, too.

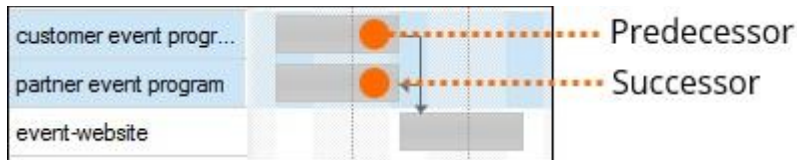
Example: The successor activity “partner event program” starts at the same time as the predecessor activity “customer event program”. That means that unless the predecessor has started, the successor cannot start.



Finish-to-Finish Dependency:

This type of dependency restricts the end of the successor, as it can only end when, and if, the predecessor has been successfully completed.

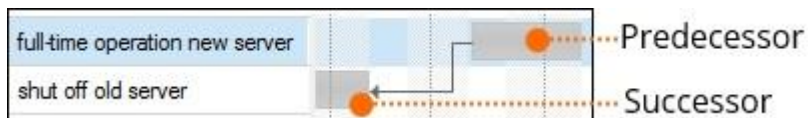
Example: The predecessor “customer event program” has to be completed at the latest on the end date of the successor “partner event program”, as the two programs have to be finalized for the creation of the event website.



Start-to-Finish Dependency

This type of dependency is only useful if you create a [work-back project plan](#) (work-back schedule). When you create a Start-to-Finish Dependency you link the start of the predecessor with the end of the successor.

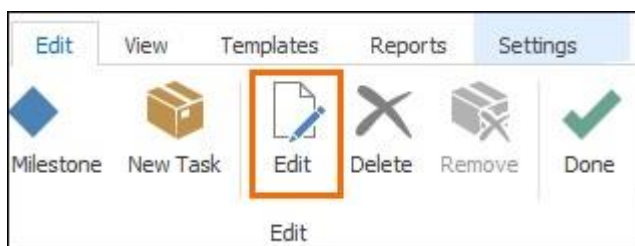
Example: If a company plans to shut down a server on a certain date and move their data to a new datacenter to consolidate the hosting, they need to make sure that the new server is up and running before they can shut down the old server. Therefore, the predecessor “full-time operation new server” needs to be completed before the successor “shut off old server” can happen.



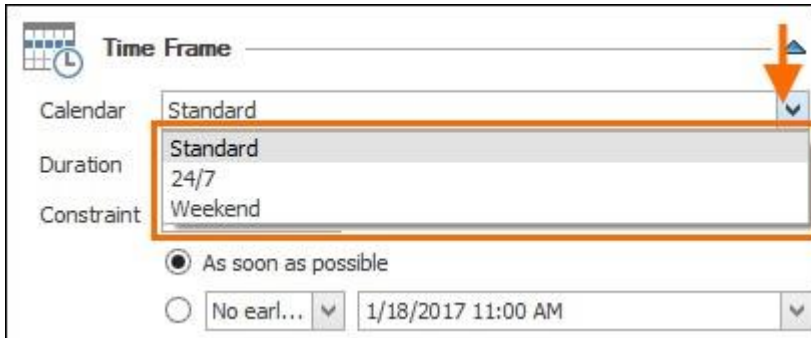
Set the start date and duration of planning elements

After having linked planning elements, you can set their start dates and duration. The end date of activities and summary activities is determined by when (date and time) they start and how long they take (duration). Milestones only have a start date – the date and time they happen.

1. To edit the planning element, double-click on it or click on it once and click on **Edit** in the ribbon.



2. In the side panel on the right you can now select the calendar, set the start date, and set the duration of the activity.



Time Frame

Calendar: Standard

Duration: Standard

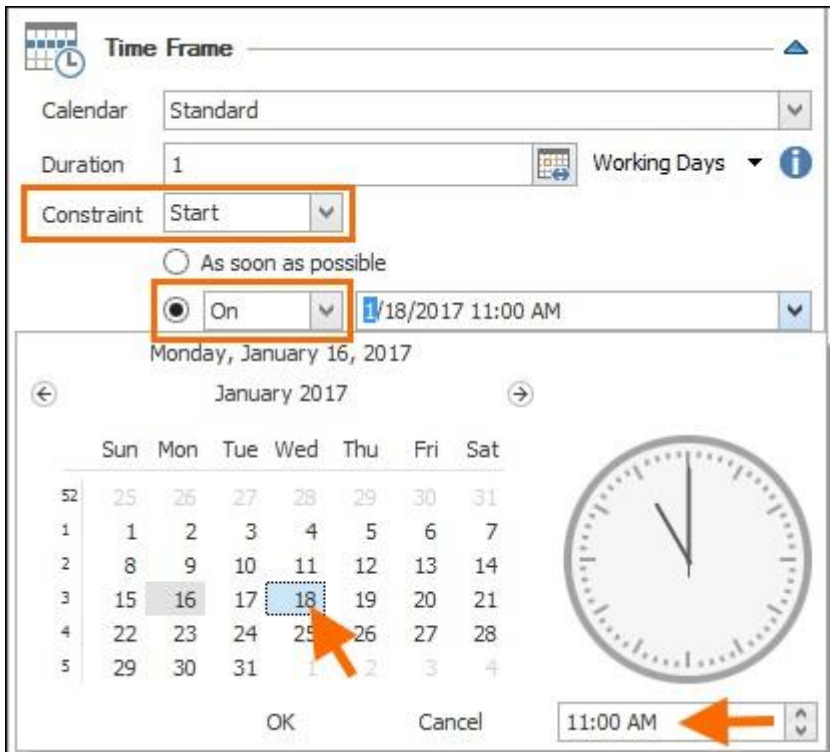
Constraint: Weekend

As soon as possible

No earl... 1/18/2017 11:00 AM

HINWEIS InLoox has three default calendars to select from: **24/7** (continuous operation), **Standard** (Monday-Friday, 8 AM-4 PM) and **Weekend** (Saturday and Sunday, 24h). InLoox will automatically use the Standard calendar. If you want to change the calendar settings, you can do that in the InLoox Options in the section **Working Times**.

3. Select e.g. **Start** and set the start date by selecting **On** and choosing the date and time from the calendar. This way you establish a so-called [constraint](#) and set a time frame for the activity.



Time Frame

Calendar: Standard

Duration: 1 Working Days

Constraint: Start

As soon as possible

On 1/18/2017 11:00 AM

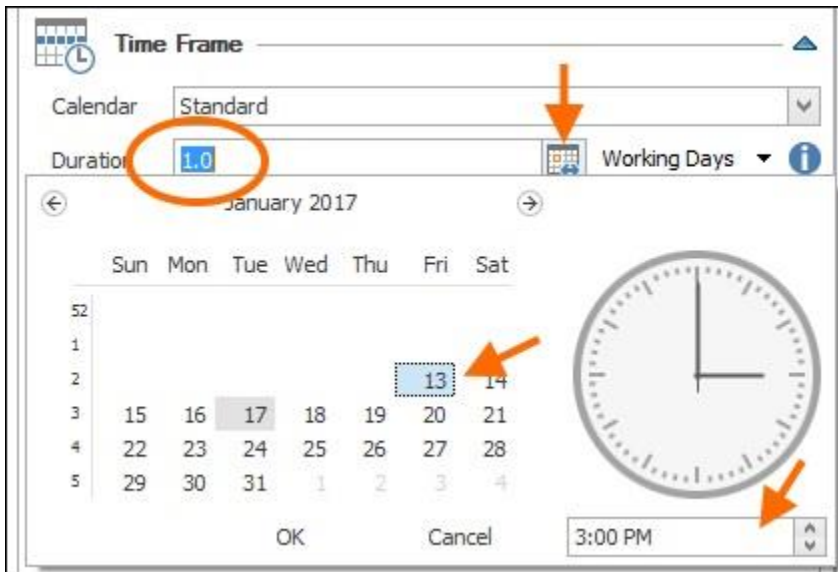
Monday, January 16, 2017

January 2017

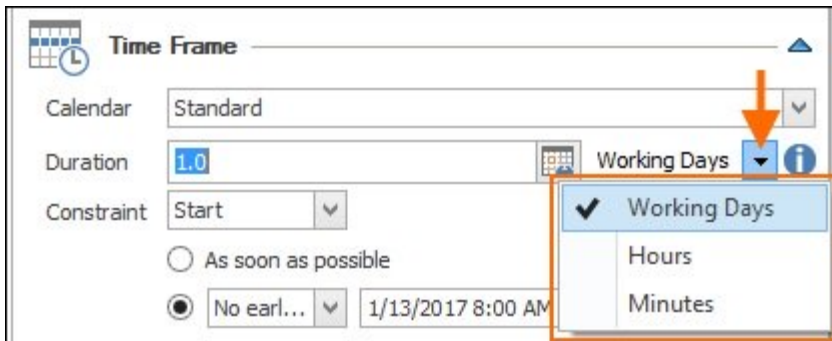
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
52	25	26	27	28	29	30	31
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31	1	2	3	4

OK Cancel 11:00 AM

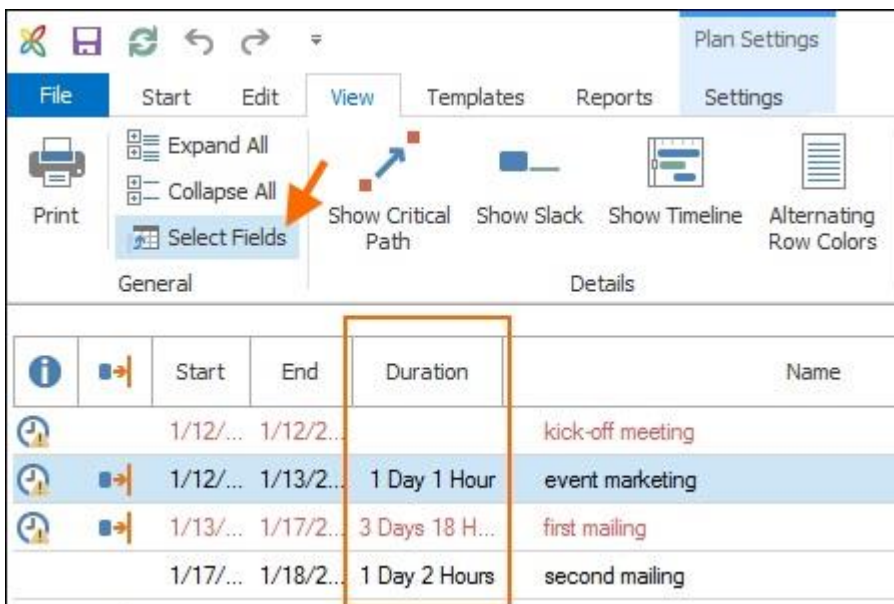
4. Now, set the duration of the activity by clicking on the calendar symbol next to the field **Duration** and selecting the end date and time of the activity. Thereby, InLoox automatically calculates the duration of the activity. Alternatively, you can also type in the work days manually.



Instead of **Work Days**, you can also select **Hours** or **Minutes** as your preferred unit of duration.



5. You can display the duration of your planning elements in the planning list. Click on **Select Fields** in the tab **View**, select the field **Duration** from the context menu and drag it into the planning list.




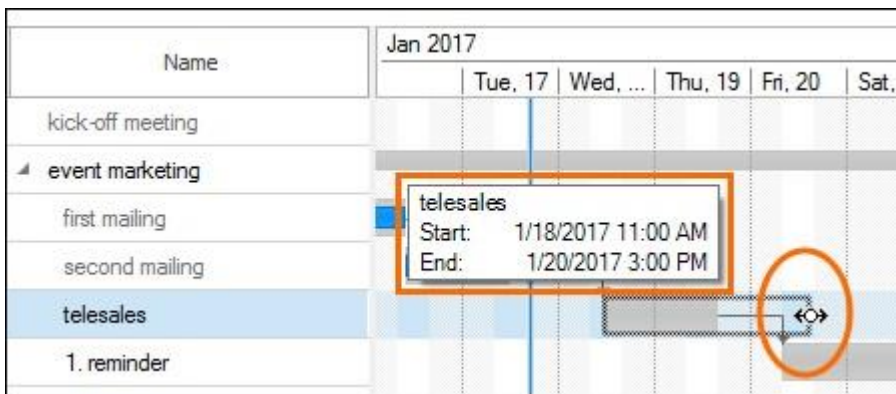
Set the duration in the Gantt-chart

It is advisable to zoom in and enlarge the view to show the individual days, so that you can work comfortably in the Gantt-chart.

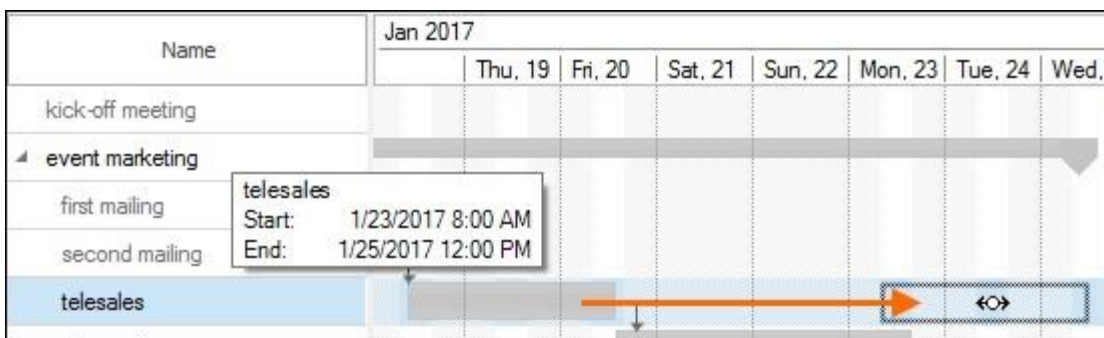
1. Click on **Zoom In** or **Zoom Out** in the tab **View** to adjust the Gantt-chart to your needs. You can also use the short cuts Ctrl + Add (zoom in) or Ctrl + Subtract (zoom out).



2. Move your cursor over the activity until it turns into . Click on the beginning or end of the activity bar and expand or contract it. A small window above the activity bar shows you the name of the activity, as well as the starting date and end date, and the starting time and end time.



3. If you want to change the starting date/time or end date/time, without changing the duration of the activity, you can move the activity bar in the Gantt-chart. Click on the activity bar in the Gantt-chart and move it right or left to the desired date.



Delete dependencies

If you want to delete a dependency, you can either:

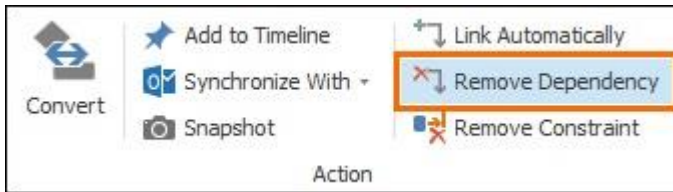
1. Click on the undo button in the Outlook tool bar in the upper left-hand

corner .


Or:

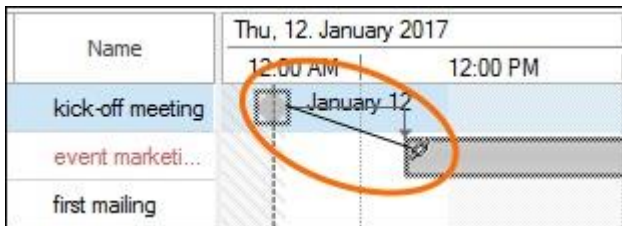
1. Press Ctrl and click on the planning elements that are linked by dependencies, which you want to delete.

2. Then open the tab **Edit** and click on **Remove Dependency** in the section **Action**. Alternatively, use the shortcut Ctrl+Alt+D.



Or:

1. Move the mouse over the predecessor until the cursor turns into , click on the planning element and retrace the link with the mouse button held down. When you are hovering over the successor, let go of the mouse and the link is deleted.



Set constraints

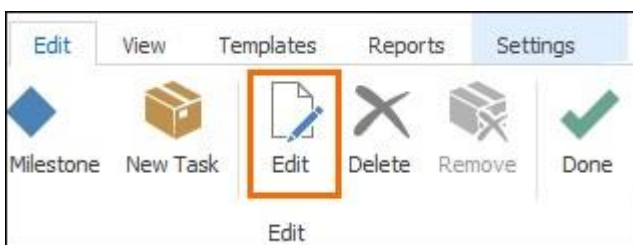
When you set constraints in a project plan, you essentially set time restrictions. Constraints put project phases within a specific time frame and can be set for milestones, activities and summary activities. Constraints on planning elements limit the flexibility of the project plan: the project planner or project manager cannot move planning elements along the timeline freely but need to plan within the timely constraints. Learn more about constraints [here](#).

Before you set constraints, you should have established dependencies between your planning elements.

Set constraints on activities and summary activities

After you have created planning elements and established dependencies automatically or manually, follow these steps:

1. Double-click the planning element you want to edit or click on the planning element once and then on **Edit** in the Ribbon.



Now you can edit the planning element in the side panel on the right.

1. In the section **Time Frame** you have the field **Constraint** where you can now set the restriction for this planning element.

2. Select the type of constraint you want to set (e.g. *Start* on a certain date) and select the date and time in the calendar. The different types of constraints are explained above.

The screenshot shows the 'General' dialog box with the 'Time Frame' section expanded. The 'Constraint' dropdown is set to 'Start'. Below it, the 'As soon as possible' radio button is unselected, and the 'On' radio button is selected, with a date and time of 1/23/2017 8:00 AM. A calendar for January 2017 is displayed, with the date 23 highlighted. To the right of the calendar is a clock showing 8:00 AM. Three orange circles with dashed lines point to the 'Start' dropdown, the 'On' radio button, and the time selection field.

Select the date from the calendar

Choose the type of constraint, e.g. "Start".

Select the time

Set constraints on milestones

In contrast to activities, milestones do not have a duration; nevertheless, you can constrain a milestone's start or end date and/or time. This is done the same way as with activities.

General

Name: kick-off meeting

Description:

Time Frame

Calendar: Standard

Constraint: Start

As soon as possible

On: 1/12/2017 8:00 AM

Thursday, January 19, 2017

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
52	25	26	27	28	29	30	31
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31	1	2	3	4

OK Cancel 8:00 AM

Select the date from the calendar

Choose the type of constraint, e.g. "Start".

Select the time

Overview: Types of constraints

You can set different kinds of constraints on planning activities.

- **Start as soon as possible** – Choose **Start** and click on **As soon as possible**. If you set this type of constraint, this planning element is set to start as soon as its predecessor is finished. This allows for maximum flexibility in your project plan.

Time Frame

Calendar: Standard

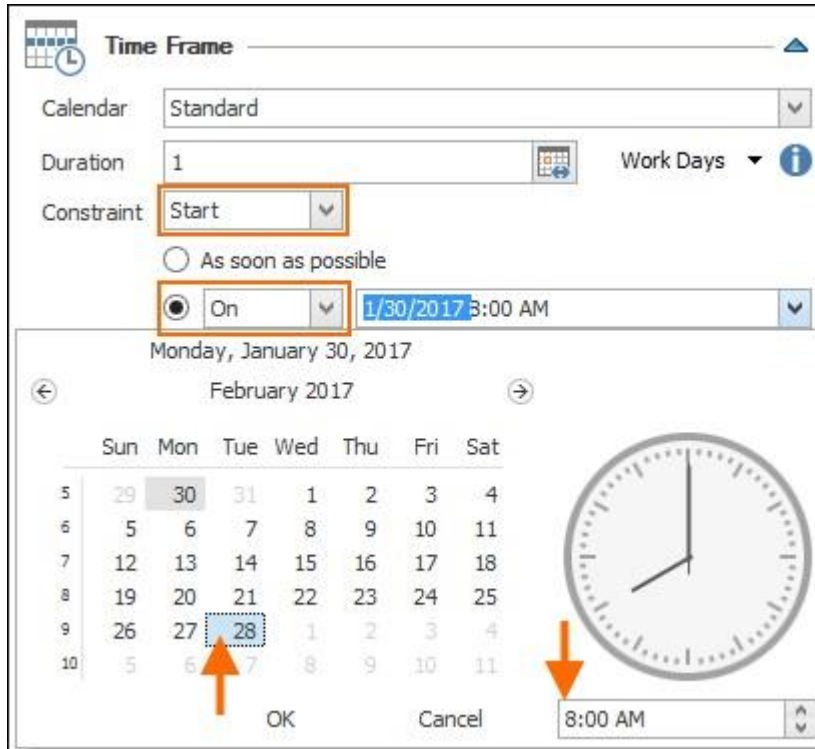
Duration: 1 Work Days

Constraint: Start

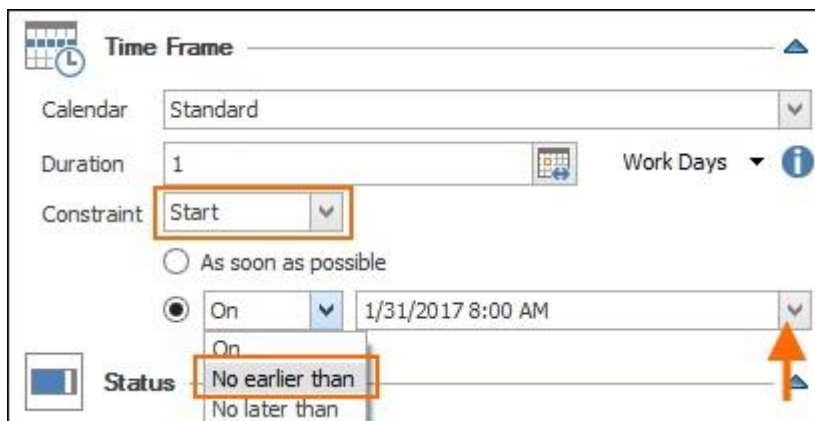
As soon as possible

No earl... 1/13/2017 8:00 AM

- Start is on a specific date** – If your planning element is supposed to start (activity) or happen (milestone) on a specific date, select **Start** and **On**. Then choose the date and time for the start of the planning activity. The activity will have to be started on this specific date, otherwise, you will be alerted to a constraint violation as you will see this symbol in your Gantt-chart.



- Planning element must not start before a certain date** – If you set this type of constraint, the planning element may only start on or after a certain date. Select **Start** and **No earlier than**. Then select the start date and time from the calendar. The planning element can be delayed into the future, but may not be moved up earlier along the time line.



- Planning element must start no later than on a certain date** – This type of constraint is useful, if a planning element must start before a certain date. The planning element then needs to start on this date at the latest. Select **Start** and **No later than** and then choose the date and time from the calendar.

Time Frame

Calendar: Standard

Duration: 1

Work Days: [icon] [i]

Constraint: Start

As soon as possible

On 1/31/2017 8:00 AM

Status: No earlier than

No later than

- **End date is as late as possible** – Select **Finish** and click on **As late as possible**. This constraint is set when the latest possible end date for completion should be calculated from the end date of the whole project.

Time Frame

Calendar: Standard

Duration: 1

Work Days: [icon] [i]

Constraint: Finish

As late as possible

No earl... 1/13/2017 8:00 AM

- **Planning element must be completed on a specific date** – If a planning element needs to be finished on a specific date, select **Finish** and **On**. Then select the date and time from the calendar. This planning element may not be moved along the timeline and must not end earlier or later than on the set date.

Time Frame

Calendar: Standard

Duration: 1

Work Days: [icon] [i]

Constraint: Finish

As late as possible

On 1/30/2017 8:00 AM

Monday, January 30, 2017

February 2017

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	29	30	31	1	2	3	4
6	5	6	7	8	9	10	11
7	12	13	14	15	16	17	18
8	19	20	21	22	23	24	25
9	26	27	28	1	2	3	4
10	5	6	7	8	9	10	11

OK Cancel


8:00 AM


- **Planning element must not be completed before a certain date** – If you set this constraint, this planning element may be finished on or later than the set date. It must not be completed sooner, though. Select **Finish** and **Not earlier than** and then select the earliest possible date and time from the calendar.

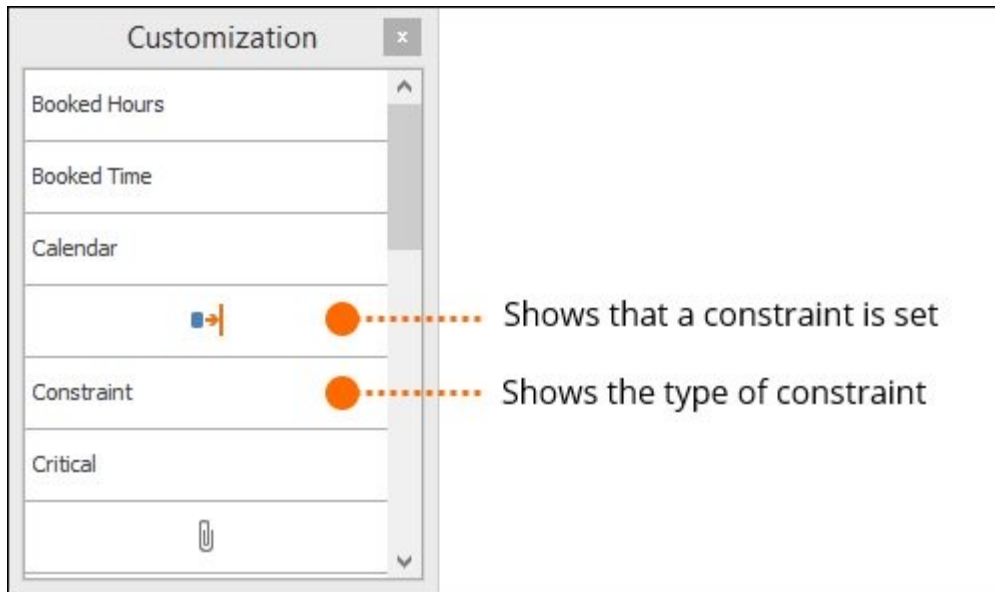
The screenshot shows the 'Time Frame' dialog box. The 'Calendar' is set to 'Standard'. The 'Duration' is '1' work day. The 'Constraint' is set to 'Finish'. Underneath, the radio button for 'As soon as possible' is unselected, and the radio button for 'On' is selected. The date and time are set to '1/31/2017 8:00 AM'. The 'Status' dropdown menu is open, showing 'No earlier than' selected. An orange arrow points to the date field.

- **Planning element must be completed on a specific date at the latest** – With this type of constraint, the planning element must be completed as soon as possible but no later than on the set date. Its completion must not be delayed at all. Select **Finish** and **No later than**, then choose the latest possible date and time for the completion from the calendar.

The screenshot shows the 'Time Frame' dialog box. The 'Calendar' is set to 'Standard'. The 'Duration' is '1' work day. The 'Constraint' is set to 'Finish'. Underneath, the radio button for 'As soon as possible' is unselected, and the radio button for 'On' is selected. The date and time are set to '1/31/2017 8:00 AM'. The 'Status' dropdown menu is open, showing 'No later than' selected. An orange arrow points to the date field.

HINWEIS Constraints on single planning elements influence the whole project plan. It may be that you are not able to move planning elements freely along the timeline, due to constraints set on planning elements. If this is the case, InLoox alerts you to possible constraint violations with the symbol “constraint violation”  in the planning list next to those planning elements that are affected.

TIPP For better overview, it is advisable to show the field **Constraint** and/or the field with the symbol  in the planning list.



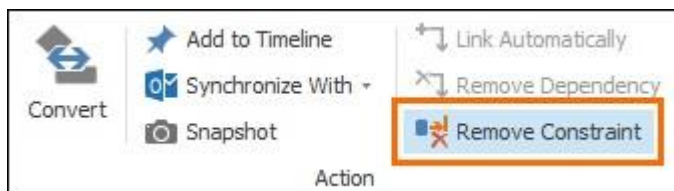
Remove constraint

You can remove constraints by either:

Clicking on the undo-symbol  in the tool bar, if you want to remove the constraint you have just created.

Or:

By clicking on the planning element the constraint of which you want to remove and then clicking on **Remove Constraint** in the ribbon in the tab **Edit**. Alternatively, you can also use the short cut CTRL+ALT+R.



Add lag to planning elements

In certain instances, you may want to include some buffer to account for delays or external factors that affect your project. In this case, you can add lag in your project plan. Lag times can also serve as a kind of time constraint between planning elements.

1. Double-click on the link that connects two planning elements to open the window **Edit Dependency**.
2. Add **lag** in work days or hours and minutes.

Edit Dependency

Dependency

From: first mailing

To: second mailing

Type: End to start

Lag: 3 Work Days
00:00 Hours:Minutes

Negative

OK Cancel

3. You can also add lead time. Click on **Negativ** when the successor can start before the predecessor is completed.

Edit Dependency

Dependency

From: location

To: program

Type: End to start

Lag: 2 Working Days
00:00 Hours:Minutes

Negative

OK Cancel

Add tasks to your project plan

We advise to only add tasks to your project plan once you have completed your project structure and established logical dependencies and added time constraints. As soon as you add tasks to your planning elements, you can no longer edit the planning element. You would have to remove the tasks again.

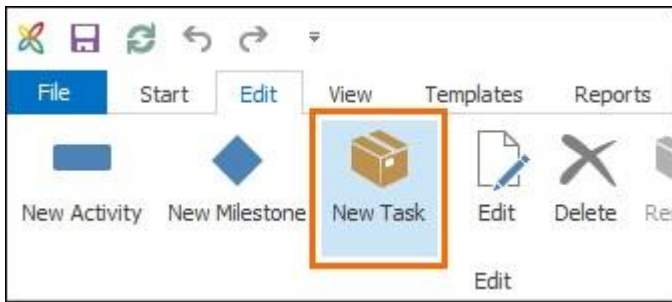
You can add tasks to your project plan in two ways:

1. [Drag and drop existing project tasks to your Gantt-chart.](#)
2. Create project tasks manually in your Gantt-chart.

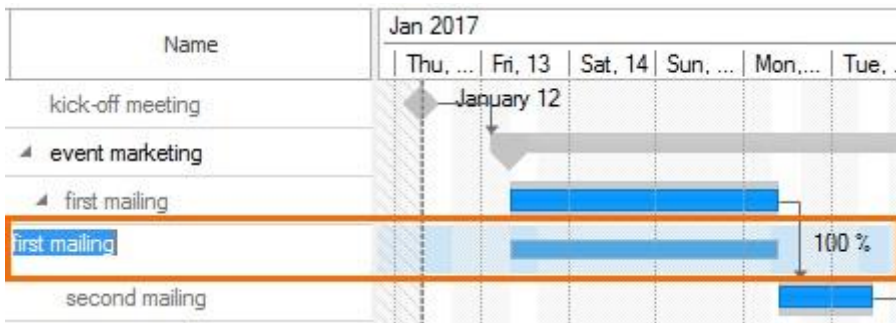
Add new project tasks manually

Follow the next steps to create new project tasks and add them to project elements in your Gantt-chart.

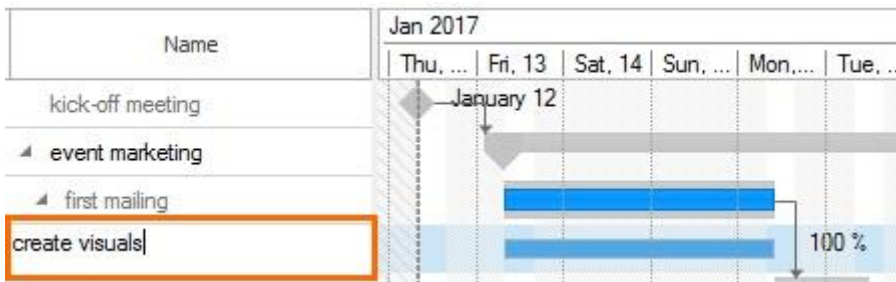
1. Click on the activity or milestone to which you want to assign a task.
2. In the tab **Edit**, click on **New Task**.



3. The new task is created and is given the name of the activity or milestone to which it has been assigned.



4. You can rename the task directly in the planning list.



Or double-click on the newly created task to open the side panel where you can enter all the relevant information for the task. As with the name, the task's start and end date, as well as the effort are the same as the activity or milestone it has been assigned to.

5. After you have edited the new task, click on the close button in the upper right hand corner to close the side panel and save the edits.

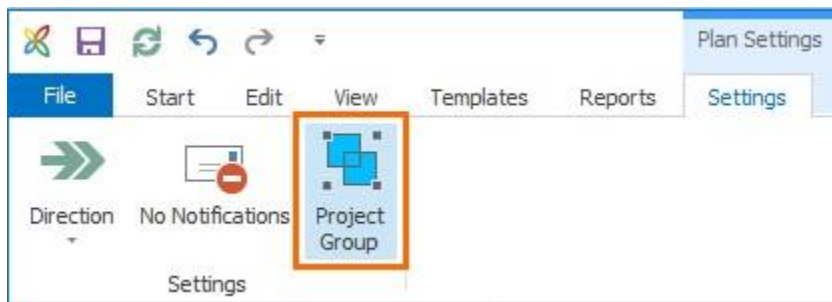
Project groups: Multi-project management with dependencies between projects


When you need to manage multiple projects it is useful to combine their project plans in one by creating a project group. Such a project group consists of two or more sub-projects. They can either belong to one big project or the completion of some activities etc. in one project are the prerequisite to being able to complete activities etc. in the other one. It can also happen, that several different departments need to liaise on the same project. Then it can be useful to break the whole project down into smaller ones for each department and link these project plans to create a project group.

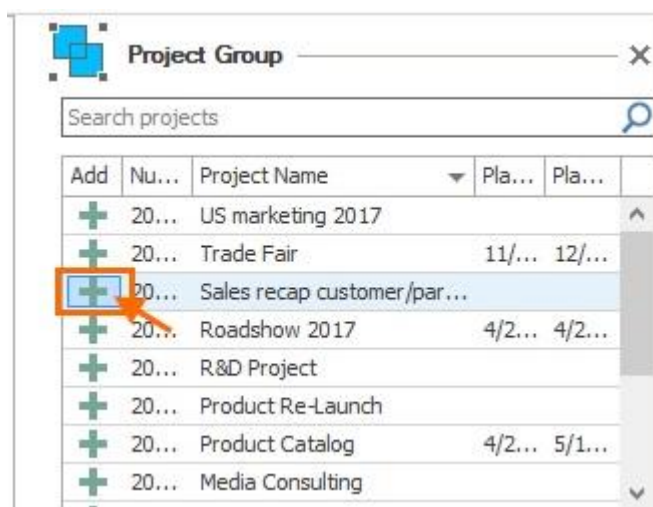
NOTE In order to be able to create project groups, you need to have the permissions to **edit projects** and to **edit planning**, either in your user based permissions or in your role based permissions. If you only have reading permissions for projects, you cannot create project groups. You can change the user and role-based permission in the [InLoox options](#) (requires admin permissions).

Create a project group

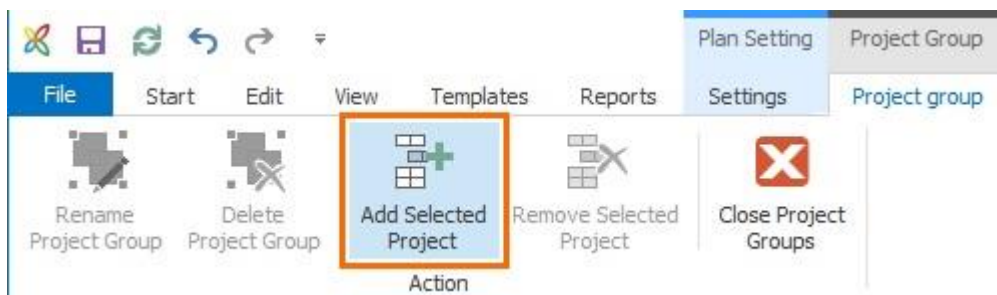
1. Click in the tab **Settings** on **Project Group**.



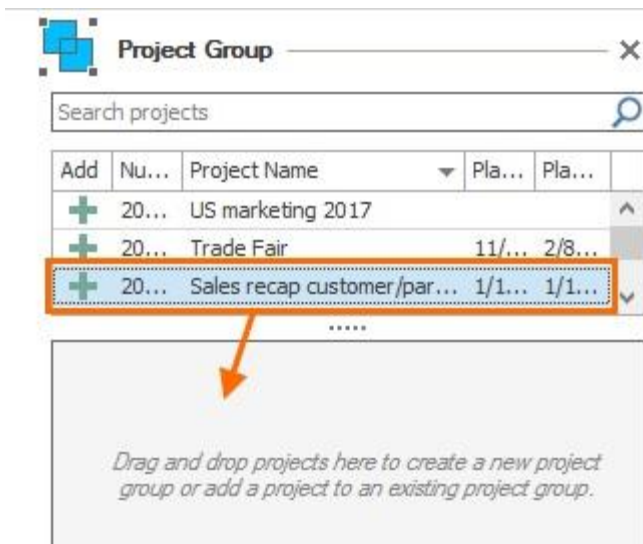
2. On the right hand side, select the project you want to add to your project from the side panel by clicking on the add-symbol .



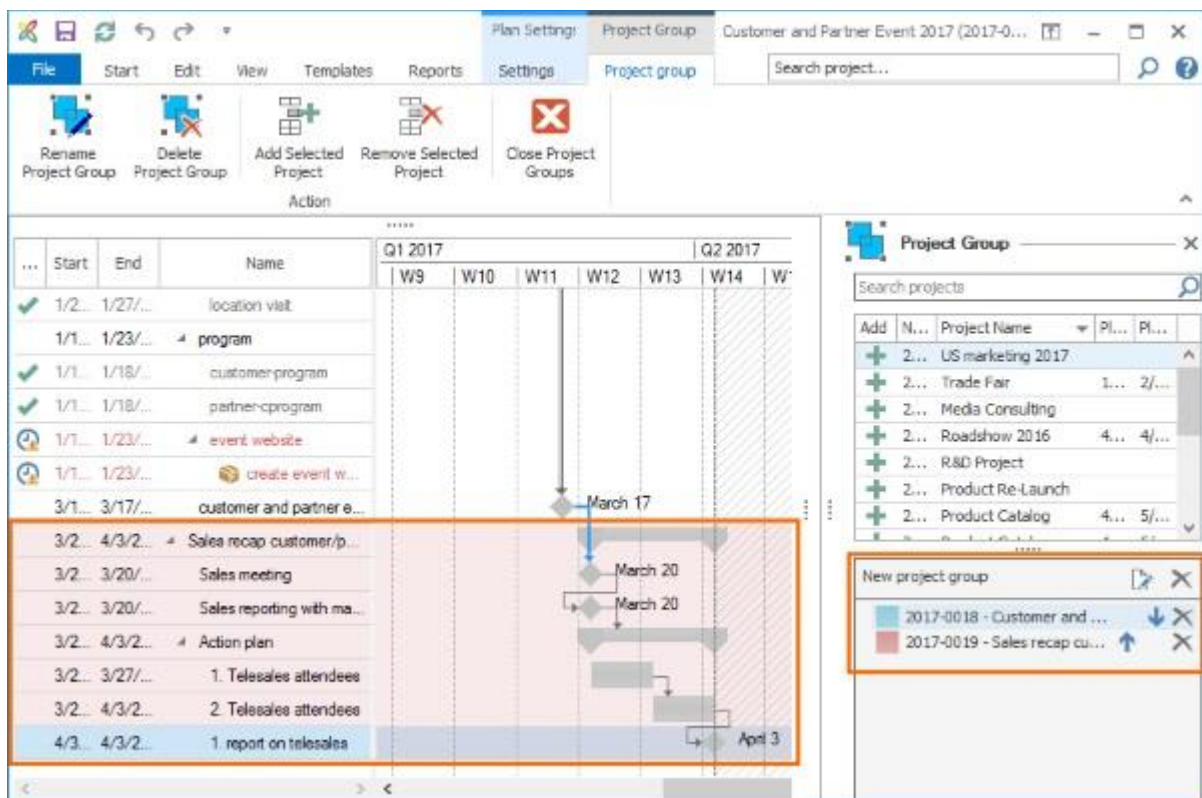
Or click on **Add Selected Project** in the tab **Project group**.



Or drag the selected project from the list down into the grey box.

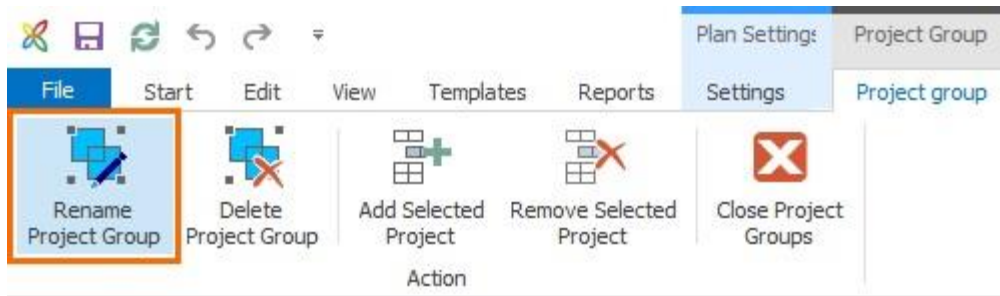


3. Now, you see the added sub-project in the Gantt-chart as well as in the grey box **New Project Group** in the side panel on the right.

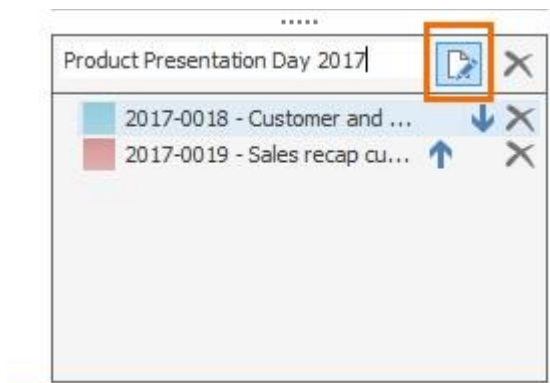


HINWEIS If you add a sub-project for which you do not have editing permissions, you will only see a bar with the sub-project's name on it. You won't be able to see the individual planning elements and cannot edit the sub-project!

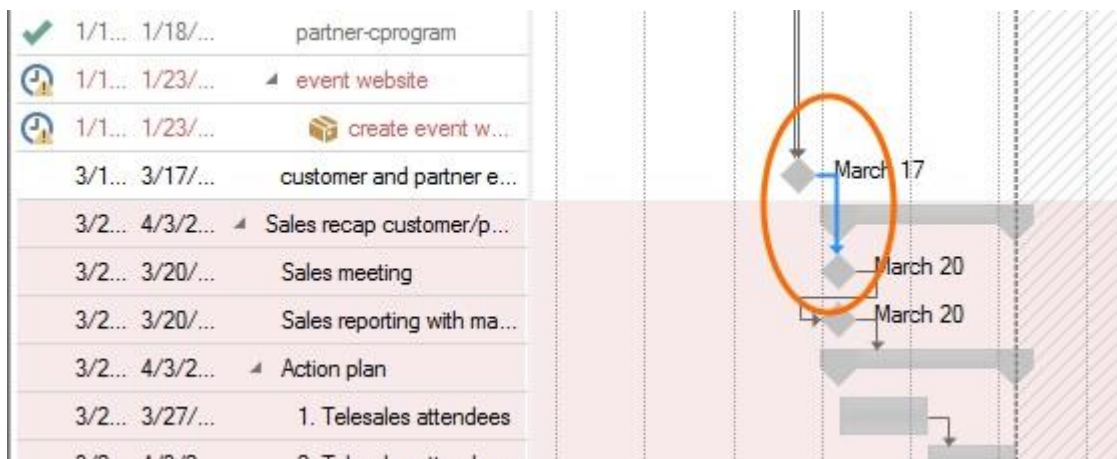
4. Now enter a new name for this project group. Either click on **Rename Project Group** in the ribbon,



Or click on the symbol  next to **New Project Group** in the side panel and enter the new name of the project group.




5. Now, you establish the dependency between the two projects. The dependency between different projects in a project group is blue, so you can distinguish it from the dependencies within a project, which are grey.



Now, you can edit your project plan as usual. Changes to each of the project group's sub-project plans are adopted when you save and close the project plan.

Change the order of the sub-projects in project groups

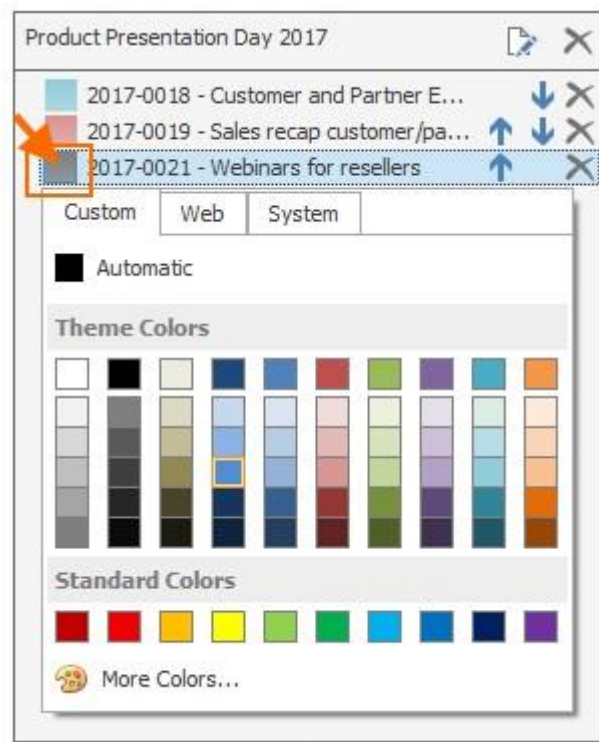
Use the arrows next to the sub-projects in the project group in the side panel, and click e.g. on  to move it up.



Highlight sub-projects in different colors

For better visual distinction, you can select different colors for individual projects in your project group. All planning elements of a project will then be highlight in the selected color.

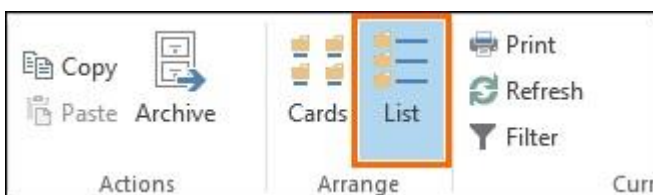
1. Click on the colored box next to the project in your project group in the side panel. Then choose a color from the drop-down menu.



NOTE If you choose a color for your original project, then this color will be displayed when you open the Gantt-chart of the added project but not in the original project's Gantt-chart.

Display project groups in the project list and sort the list accordingly

1. Click on **Projects** in the ribbon and then click on **List** in the tab **Start**.



2. Now, add the column **Project Group** to your list. Right-click onto the project list and click on **Select Fields** in the context menu.

The screenshot shows the InLoox 10 interface. At the top, a toolbar contains various icons and labels: 'Favorite', 'Categorize', 'Status', 'Copy', 'Paste', 'Archive', 'Cards', 'List' (highlighted), 'Print', 'Refresh', and 'Filter'. Below the toolbar, a table displays project data. A context menu is open over the table, listing actions such as 'New Project...', 'Open Project...', 'Delete Project', 'Favorite', 'Archive Project', 'Refresh', 'Copy', 'Paste', 'Expand All Groups', 'Collapse All Groups', 'Edit Filter', and 'Select Fields' (highlighted with an orange box).

!	Project I...	Number	Project Name
	GA	2017-0018	Customer and Partner Event 2017
		2016-0005	Media Consulting
		2016-0004	Product Catalog
		2016-0010	Product Re-Launch
		2016-0009	R&D Project
	SR	2017-0019	Sales recap customer
		2016-0006	Trade Fair
	UM	2017-0020	US marketing 2017
	WF	2017-0021	Webinars for resellers

3. Drag the field **Project Group** into the project list wherever you want to place the column.

Drag a column header here to group by that column

!	Project I...	Number	Project Name	Project Group	Manager
	GA	2017-0018	Customer and Partner Event 2017		
		2016-0005	Media Consulting		
		2016-0004	Product Catalog		
		2016-0010	Product Re-Launch		
		2016-0009	R&D Project		
	SR	2017-0019	Sales recap customer		
		2016-0006	Trade Fair		
	UM	2017-0020	US marketing 2017		
	WF	2017-0021	Webinars for reseller		

Select Fields

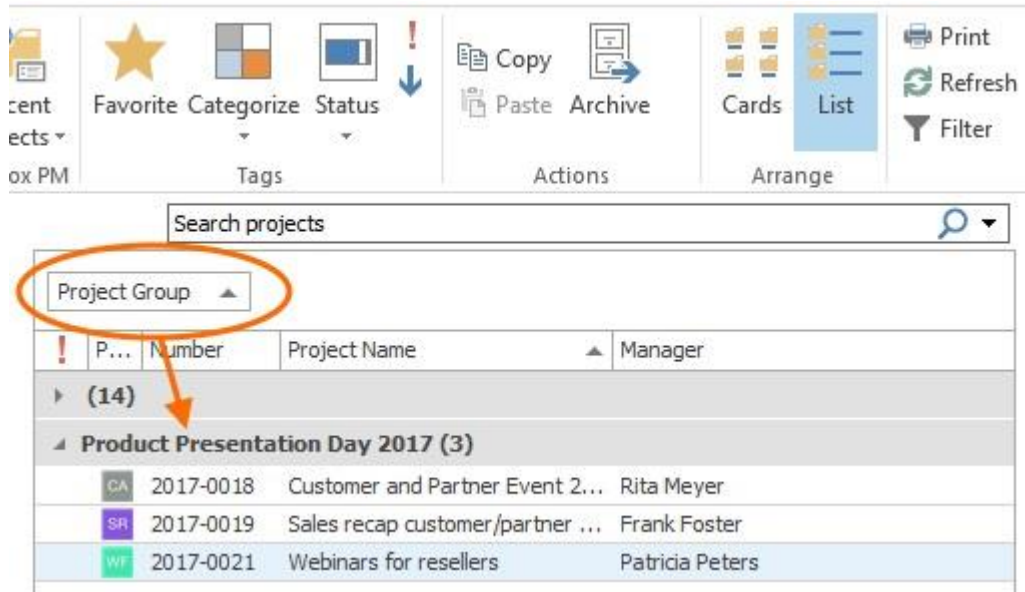
- Planned Start
- Progress (Auto)
- Project Duration
- Project Duration (Remaining)
- Project End
- Project Group**
- Project Number and Name
- Project Request
- Project Start
- Risiko
- SharePoint Document Library

4. If you want to sort the list according to project groups, drag the column **Project Group** up onto the area above the list.


Drag a column header here to group by that column

!	Pr...	Number	Project Name	Project Group	Manager
		2017-0018	Customer and Partner Event 2017		

5. Now, you see the various project groups in the list.

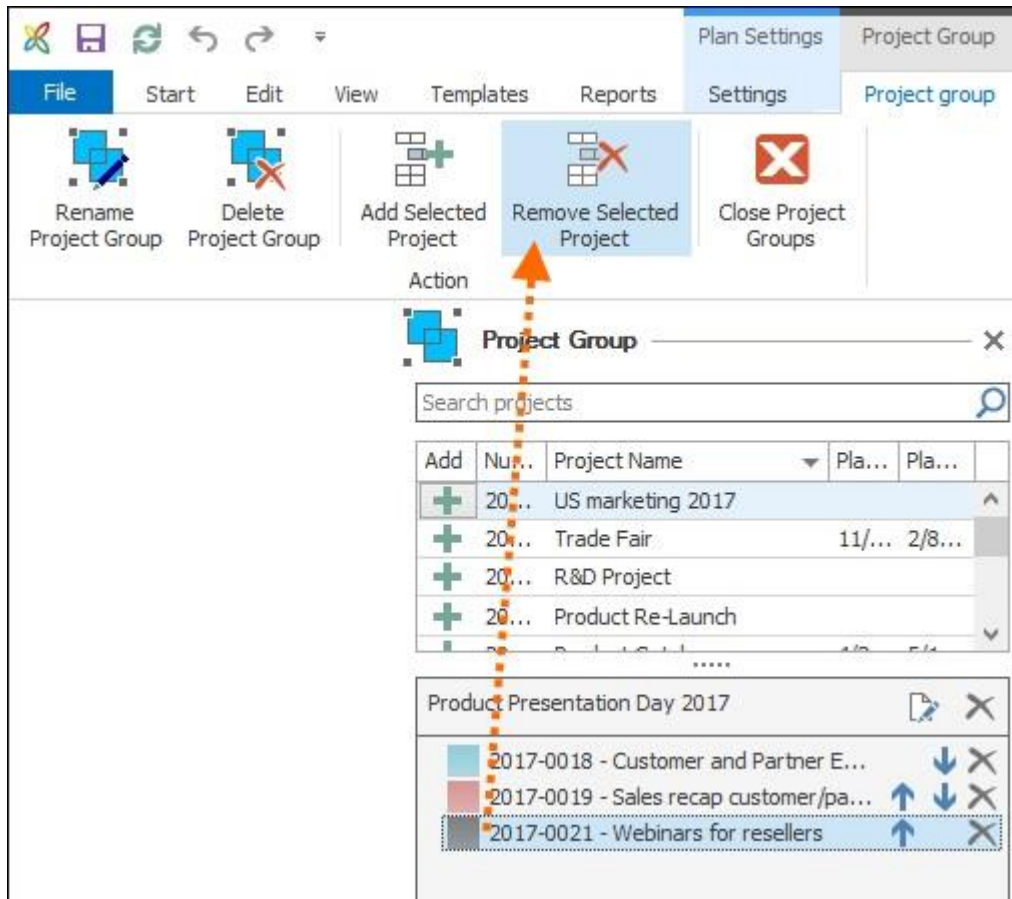


Remove sub-projects from the project group

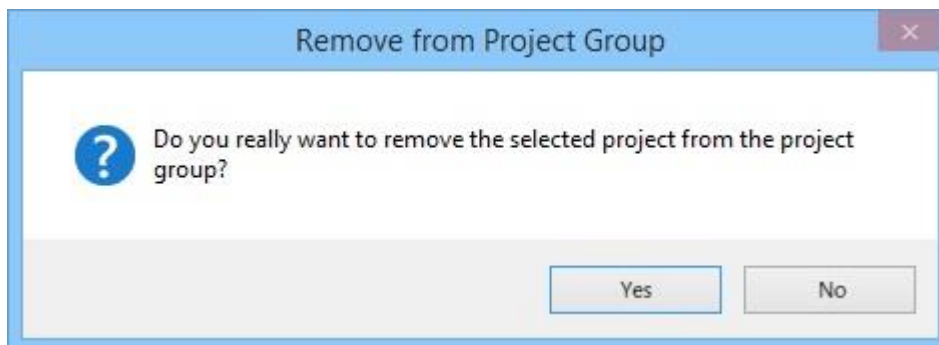
1. In the side panel, click on  next to the project you want to remove.



Or click on the sub-project you want to remove to mark it, then click on **Remove Selected Project** in the ribbon in the tab **Project Group**.

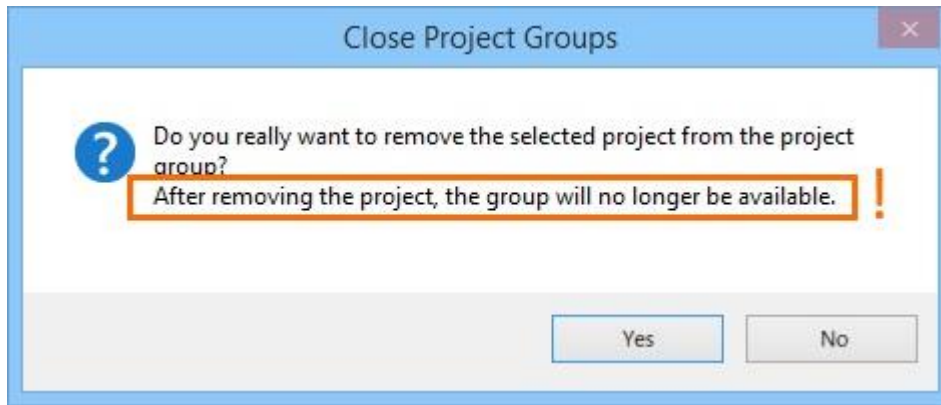


2. InLoox will ask you, if you are sure to remove the selected sub-project from the project group. Confirm by clicking **Yes**.




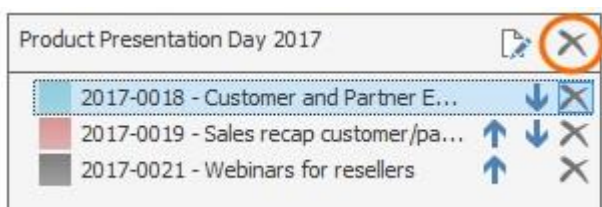
HINWEIS Once you remove a sub-project from the project group, it is no longer available for selection in the project list in the side panel. If you want to add the removed project again, please close the project and reopen it. All projects are again available for selection in the side panel.

WICHTIG If you remove the original project to which you have added sub-projects, InLoox will warn you that once you remove it, you will no longer be able to access the project group from this project.

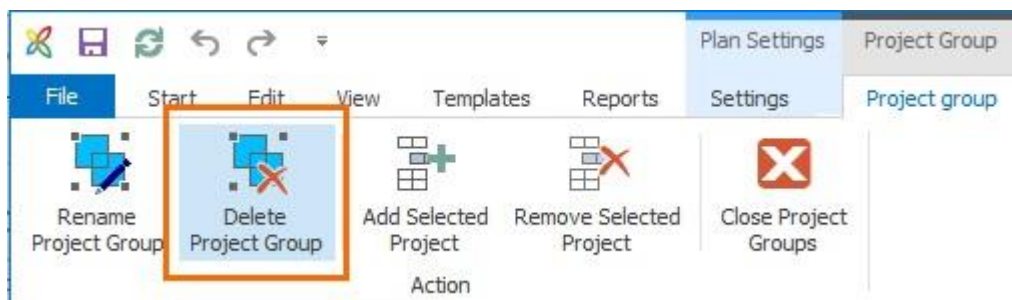


Delete a project group

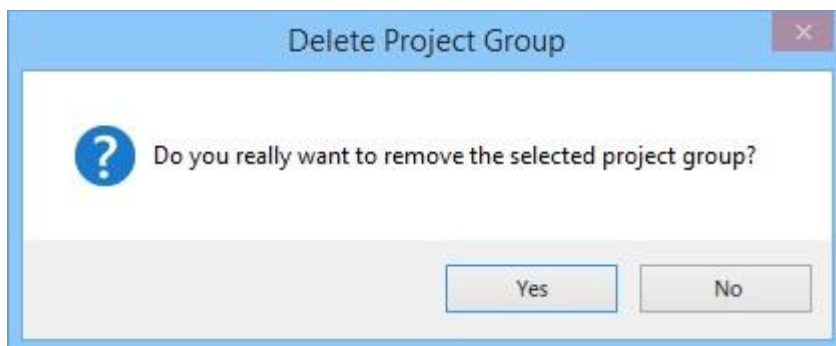
If you want to delete the whole project group, simply click on  next to project group's name in the side panel.



Or click on **Delete Project Group** in the ribbon in the tab **Project Group**.



InLoox will ask you again, if you really want to delete the whole project group. Confirm by clicking **Yes**. The project group will be removed and the sub-projects no longer belong to it.



NOTE Each sub-project is still available. InLoox does not delete sub-projects when you delete a project group.

Publish planning elements in other project plans

With the publication feature, you can use selected planning elements (i.e. activities and milestones) in other projects.

Application examples:

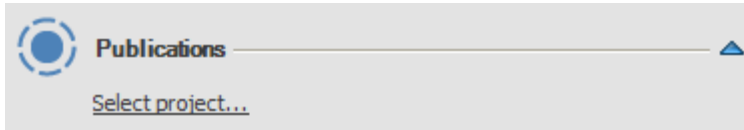
- There is a global annual department planning. The goal is to adopt activities from the global planning into other projects that take place during the year. If a change is made to the activity in the global plan this should be incorporated into the other projects.
- You want to incorporate milestones from a corporate milestone plan into projects of different departments.

TIP If you don't want to use individual planning elements in other projects, but set dependencies between two or more projects, then we recommend to create a [project group](#).

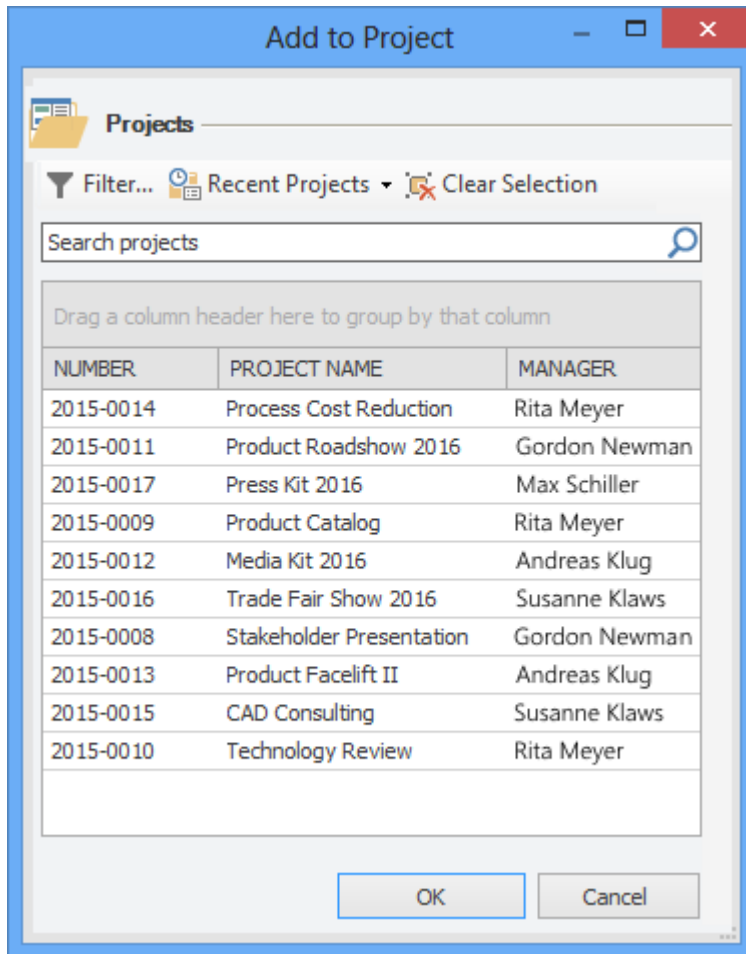
Publish planning elements

Please follow these steps to publish planning elements from a source project in a target project.


1. Open the [planning](#) of the source project. Mark the activity or milestone in the Gantt plan that you want to use in another project.
2. Click on the **Edit** tab onto the **Edit** button in the Ribbon or double-click onto the selected planning element.
3. On the right side of your Gantt plan, a side panel opens where you can edit planning elements. In the **Publications** group, click on **Select project...**

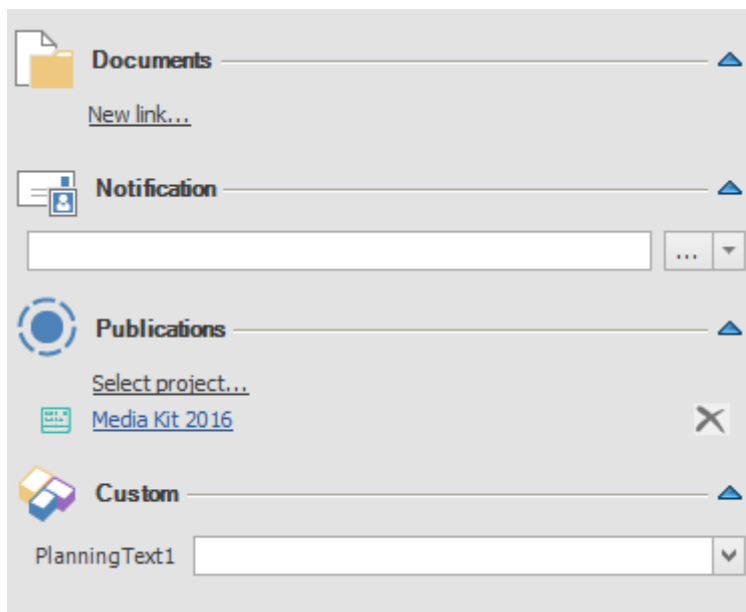


4. In the dialogue **Add to Project** you'll find all projects that you have a [reading permission](#) for. Select the target project. You are only able to confirm your selection with **OK** if you also have the permission to edit the planning of the selected target project.



5. When the publication was successful, you will find a link to the target project in the side panel in the **Publications** group. If you want to delete the publication click on the black

cross  right of the target project.



In the Gantt plan, published planning elements are indicated by the following icon:



NOTE It is only possible to publish activities and milestones. The assigned work packages are only visible in the source project. Summary activities cannot be published.

NOTE If an activity has already been published in another project, which the current user is not allowed to access, he or she will only see the remark “Project” in the **Publications** group.

Necessary permissions

A user needs the following permissions to be able to publish planning elements:

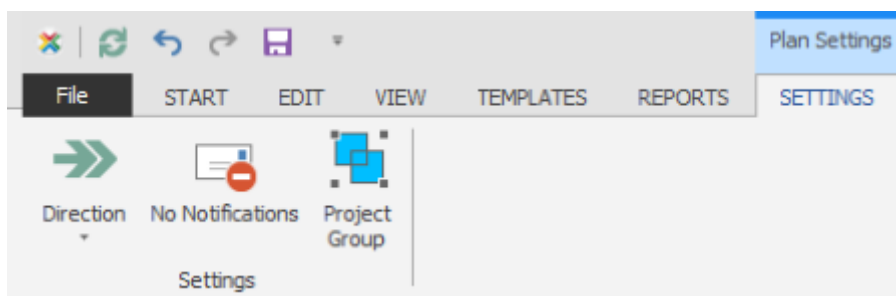
- In the source project: Read planning
- In the target project: Read planning & Edit planning

Notifications

As soon as an activity has been published, an automatic notification will be sent to the project managers of the target project – unless this feature has been deactivated in the source project.

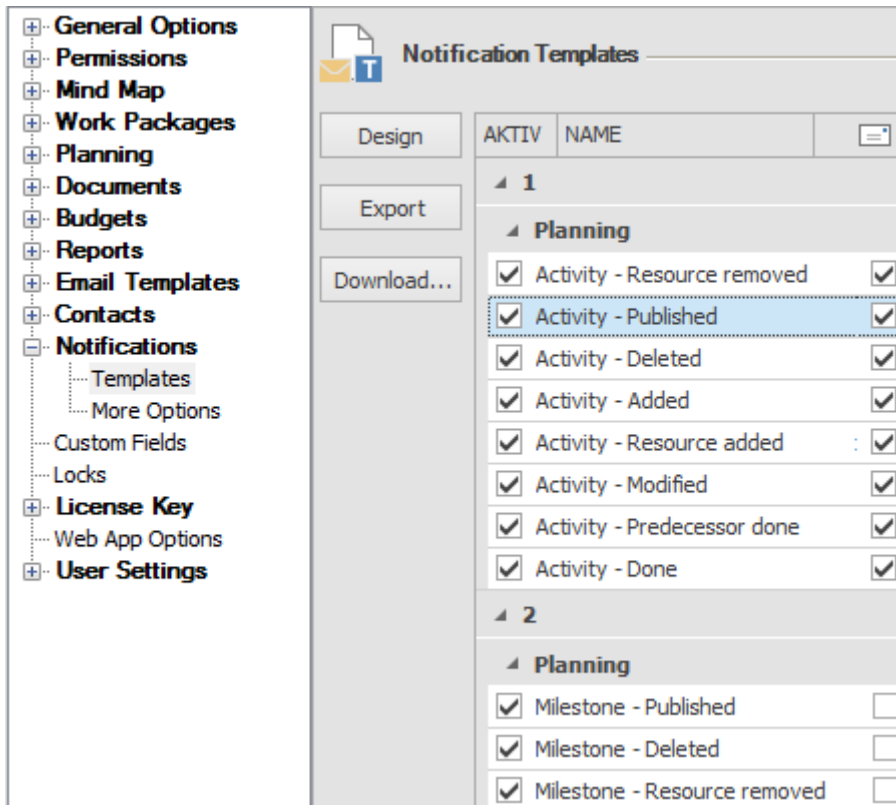
This is how you can deactivate notifications in the source project:

In the **Planning** section, on the **Settings** tab, activate the button **No Notifications**.



In the InLoox options, you'll find the regarding notification templates which you can edit according to your needs.

- Activity published
- Milestone published



TIP Please see the section *Notification Templates* to find out how you can adjust notification templates according to your needs.

How to use published elements in the target project

You'll find planning elements that have just been published in the target project at the end of the Gantt plan. Now you can move them manually to the place where you want to use them in the plan (by using the arrow buttons in the Ribbon on the **Edit** tab).

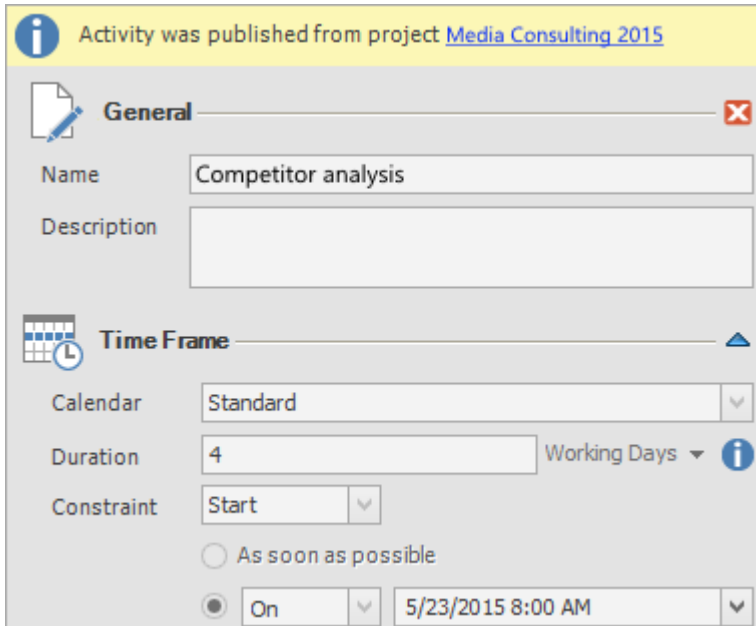


Published elements are marked by the following symbol in the Gantt plan.



Published elements can be used just like "normal" planning elements in the Gantt plan, i.e. you can create dependencies between them and the other planning elements.

Double-clicking onto the published planning element in the target project will open the side panel where you will find the notice that the regarding object is a published activity from another project and a link that leads you to the source project.



Activity was published from project [Media Consulting 2015](#)

General

Name:

Description:

Time Frame

Calendar:

Duration: Working Days ⓘ

Constraint:

As soon as possible

On

By clicking onto the link you'll get directly to the source project (provided that you have reading permissions in the source project). Only there you can edit or delete the published element.

IMPORTANT A published activity can only be edited in the source project and will not be displayed if you take a snapshot in the target project. A planning element can only be published from the original source project of the activity. Further publications into third projects are not possible.

TIP Use the filter **Current Project** to blank published elements from the target project.

Behavior in case of constraint violation

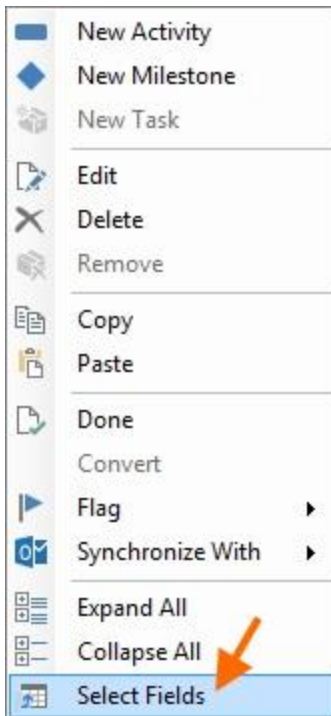
In the course of project planning it is possible that team members edit a published activity in the source project. This might affect the planning of the target project. In this case, you will find a notice when you first open the planning after the change has been made. The planning can be adjusted automatically. Activities and milestones that depend on the published elements will be moved accordingly. The rest of the planning is not affected.

Add columns to the planning list

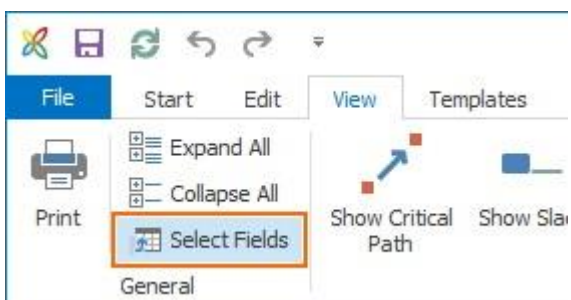
Modify the planning list by displaying different fields. By default, the Info and Name fields are displayed as columns when you open planning for the first time.

Displaying fields as columns

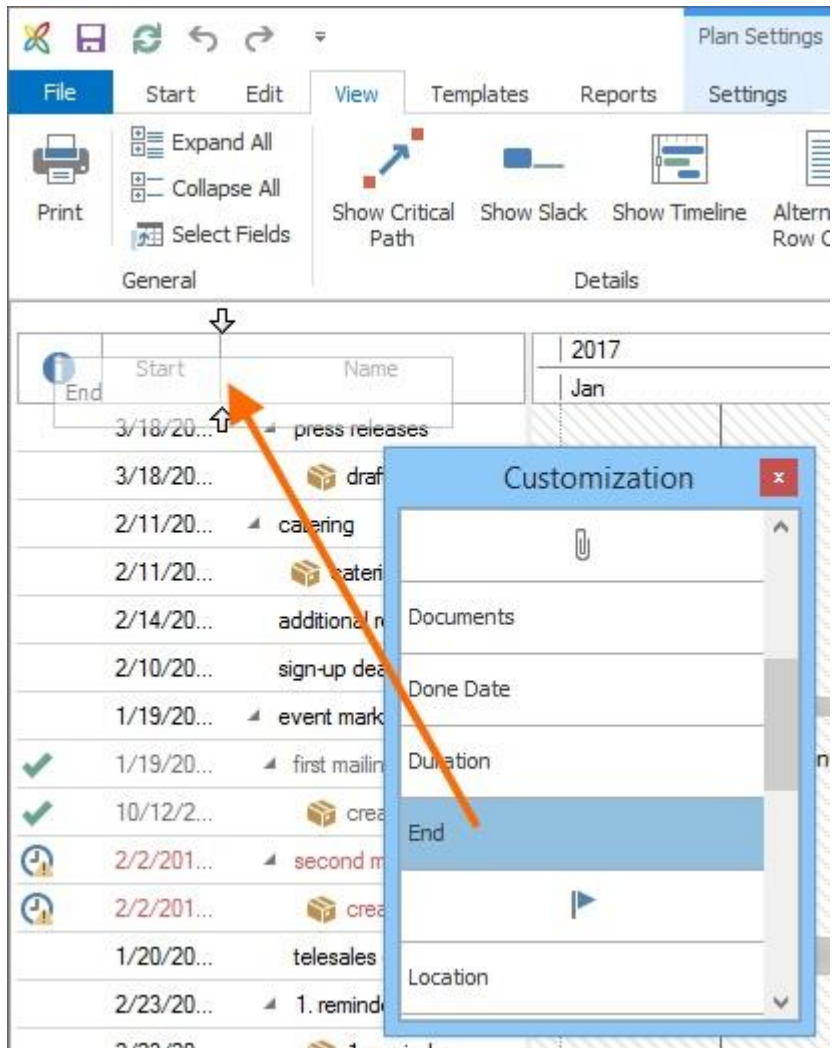
1. When you open a project plan, right-click into the planning list to open the context menu and click on **Select Fields**.



Or open the tab **View** and click on **Select Fields** in the ribbon.



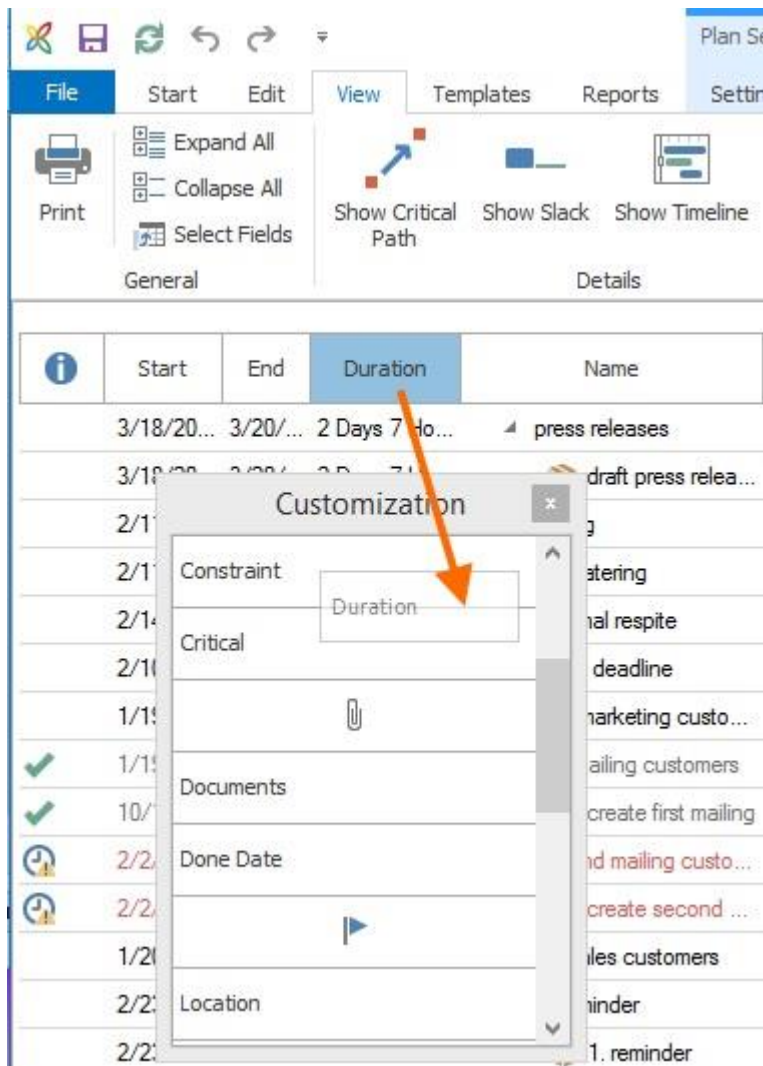
2. The window **Customization** with the available columns opens. Drag the fields from the window into the planning list.



3. Rearrange the columns by dragging the fields to another position.



4. If you want to remove a column from the planning list, open the context menu first and click on **Select Fields** to open the window **Customization** again. Then drag the field you want to remove from the planning list into the window.



NOTE InLoox will remember your customized planning list and display the selected columns in the same order once you create another project plan.

Overview of fields

The following overview describes each of the fields that you can show in your planning list:

Effort

Effort – shows the time that is allocated to the task and the accumulated time for the planning element based on the

Work Duration

Work duration – available time for the completion of the planning element or task

assigned
tasks



Timeline icon – marks the elements that are pinned to the timeline



Duration – shows the duration between start and end date of the planning element in days and hours



Constraint icon – shows that there is a constraint between planning elements



Constraint – shows the type of constraint between the planning elements, e.g. start-to-finish



End – shows the end date of the planning element




Done date – shows the date the element was marked as done



Progress – shows the stage of completion in percent based on the tasks allocated to the



Info icon – shows if an element is done, overdue, locked, or

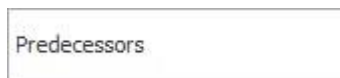
	planning element		violates a constraint
Calendar	Calendar – shows which calendar is used for this Gantt-chart		Flagged icon – shows which elements are marked with a flag
Critical	Critical – marks the planning elements along the critical chain as true or false	Successor	Successor – shows the succeeding planning element if a dependency exists
Location	Location – free text field for you to enter the location the planning element takes place at	WBS Code (Calculated)	WBSCode (calculated) – shows the automatically calculated work breakdown structure code
WBS Code (Manual)	WBSCode (manual) – free text field for your own work breakdown structure code	Resources	Resources – shows the name of the assigned resource



Start – shows the start date of the planning element



Published icon – marks those elements that are used in other project plans



Predecessor – shows the preceding planning element if a dependency exists



Workload – time needed for the completion of the planning element or task

Critical path, slack, and time line

Especially when you have a complex project plan, details like the critical path or lag time between dependent planning elements can increase transparency and help you retain a good overview.

Show critical path in Gantt chart

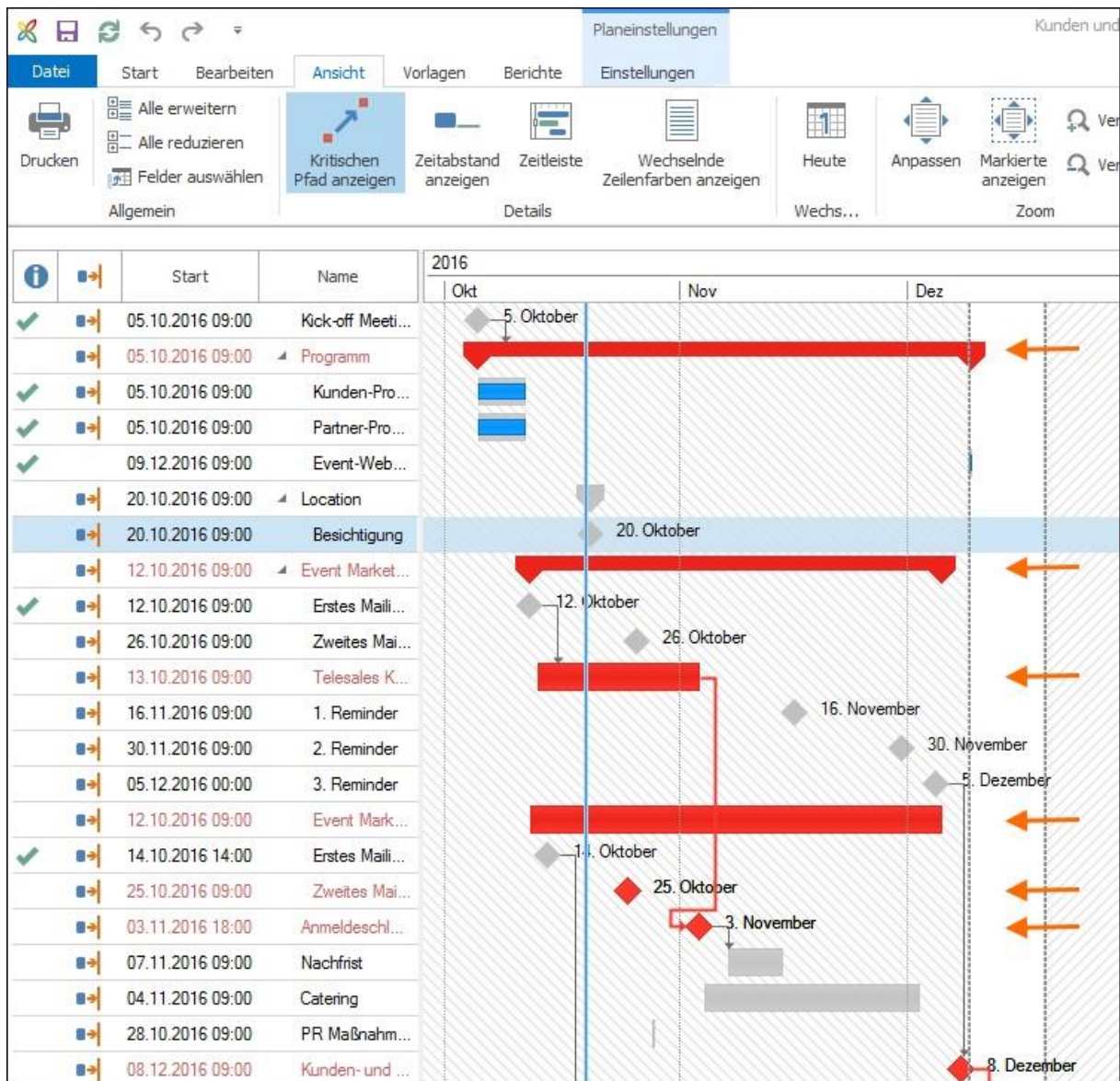
The critical path marks those planning elements that are crucial in keeping your deadline. Delays along the critical path can lead to scope creeps and possibly derail your scheduled project deadline.

If you want to show the critical path in your plan, you must already have planning elements that are connected with each other.

1. Open the project and the Gantt-chart.
2. Click on the tab **View**.
3. Click on **Show Critical Path**.



The planning elements along the critical path are marked in red in your Gantt-chart.



Snapshot Feature

The snapshot function in InLoox Planning allows you to record the current status of your project plan. You will receive a backup of your planning which you can return to if you have made wrong changes in the planning.

See our video tutorial: [How to Use the Snapshot Feature \(no audio\)](#)

Use planning elements in other projects

With the publication feature, you can use selected planning elements (i.e. activities and milestones) in other projects.

Application examples:

- There is a global annual department planning. The goal is to adopt activities from the global planning into other projects that take place during the year. If a change is made to the activity in the global plan this should be incorporated into the other projects.

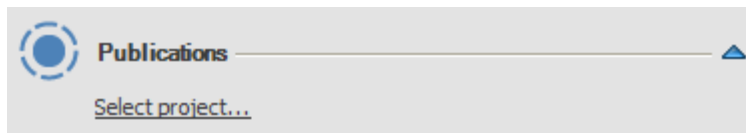
- You want to incorporate milestones from a corporate milestone plan into projects of different departments.

TIP If you don't want to use individual planning elements in other projects, but set dependencies between two or more projects, then we recommend to create a project group.

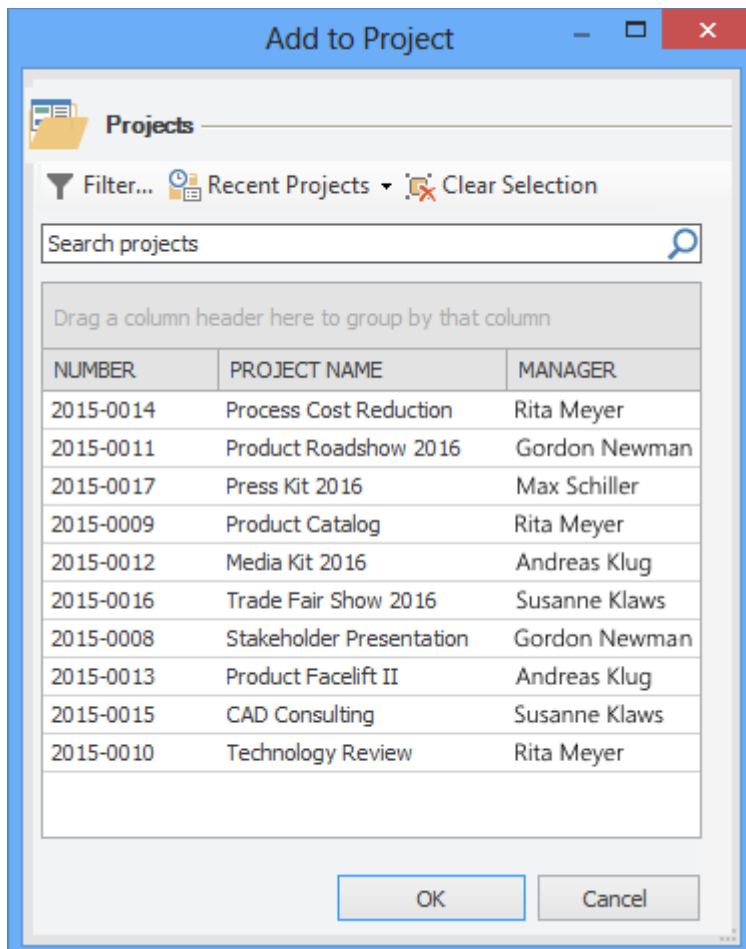
Publish planning elements

Please follow these steps to publish planning elements from a source project in a target project.


1. Open the planning of the source project. Mark the activity or milestone in the Gantt plan that you want to use in another project.
2. Click on the **Edit** tab onto the **Edit** button in the Ribbon or double-click onto the selected planning element.
3. On the right side of your Gantt plan, a side panel opens where you can edit planning elements. In the **Publications** group, click on **Select project...**

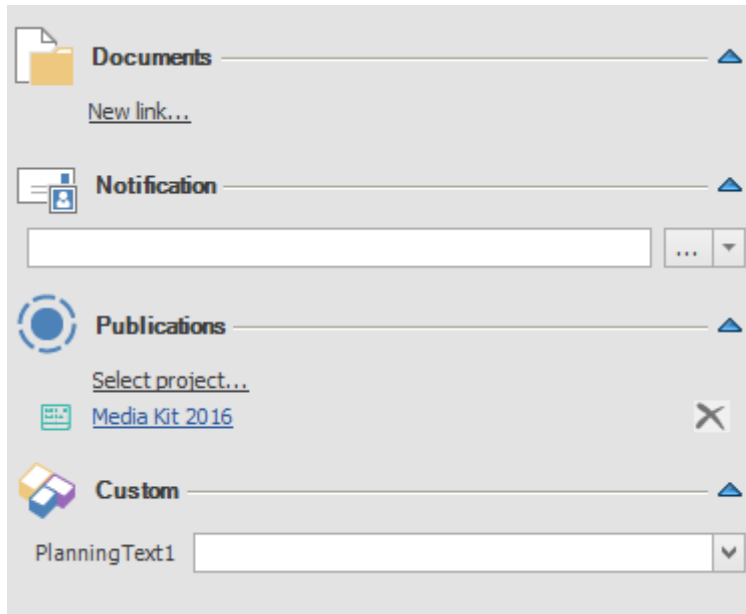


4. In the dialogue **Add to Project** you'll find all projects that you have a reading permission for. Select the target project. You are only able to confirm your selection with **OK** if you also have the permission to edit the planning of the selected target project.



5. When the publication was successful, you will find a link to the target project in the side panel in the **Publications** group. If you want to delete the publication click on the black

cross  right of the target project.



In the Gantt plan, published planning elements are indicated by the following icon:



NOTE It is only possible to publish activities and milestones. The assigned work packages are only visible in the source project. Summary activities cannot be published.

NOTE If an activity has already been published in another project, which the current user is not allowed to access, he or she will only see the remark "Project" in the **Publications** group.

Necessary permissions

A user needs the following permissions to be able to publish planning elements:

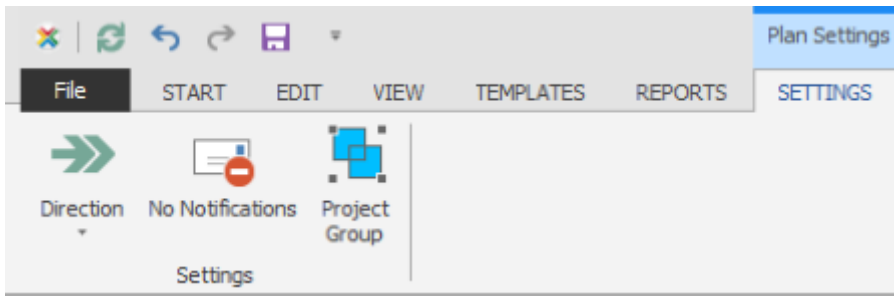
- In the source project: Read planning
- In the target project: Read planning & Edit planning

Notifications

As soon as an activity has been published, an automatic notification will be sent to the project managers of the target project – unless this feature has been deactivated in the source project.

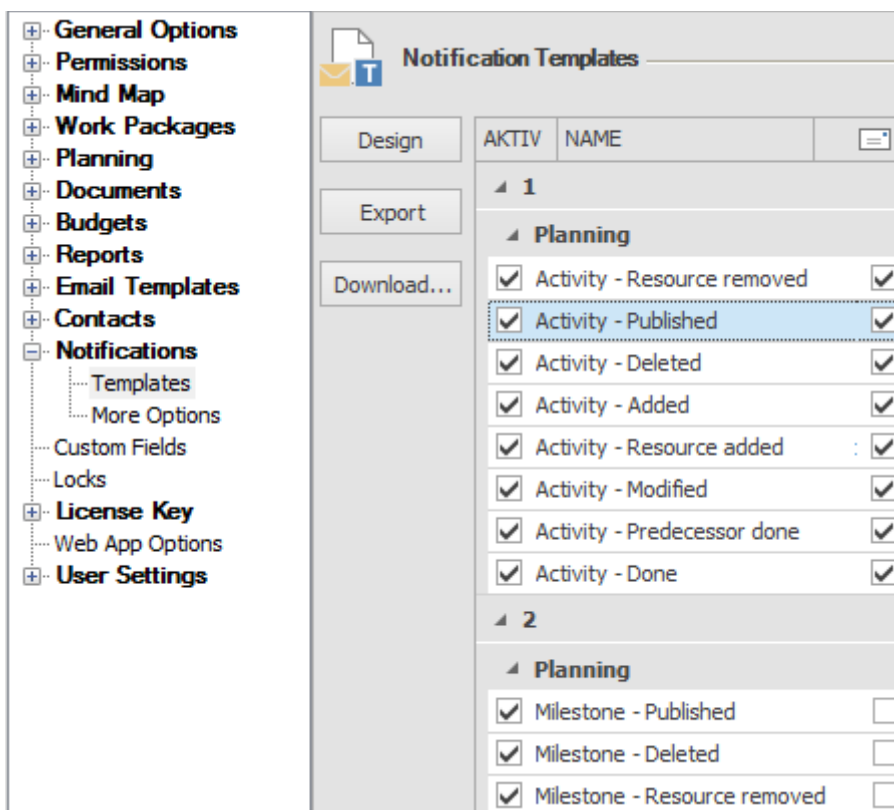
This is how you can deactivate notifications in the source project:

In the **Planning** section, on the **Settings** tab, activate the button **No Notifications**.



In the InLoox options, you'll find the regarding notification templates which you can edit according to your needs.

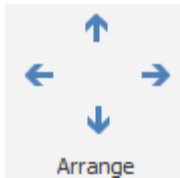
- Activity published
- Milestone published



TIP Please see the section Notification Templates to find out how you can adjust notification templates according to your needs.

How to use published elements in the target project

You'll find planning elements that have just been published in the target project at the end of the Gantt plan. Now you can move them manually to the place where you want to use them in the plan (by using the arrow buttons in the Ribbon on the **Edit** tab).



Published elements are marked by the following symbol in the Gantt plan.



Published elements can be used just like “normal” planning elements in the Gantt plan, i.e. you can create dependencies between them and the other planning elements.

Double-clicking onto the published planning element in the target project will open the side panel where you will find the notice that the regarding object is a published activity from another project and a link that leads you to the source project.

By clicking onto the link you’ll get directly to the source project (provided that you have reading permissions in the source project). Only there you can edit or delete the published element.

IMPORTANT A published activity can only be edited in the source project. A planning element can only be published from the original source project of the activity. Further publications into third projects are not possible.

TIP Use the filter **Current Project** to blank published elements from the target project.

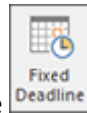
Behavior in case of constraint violation

In the course of project planning it is possible that team members edit a published activity in the source project. This might affect the planning of the target project. In this case, you will find a notice when you first open the planning after the change has been made. The planning can be adjusted automatically. Activities and milestones that depend on the published elements will be moved accordingly. The rest of the planning is not affected.

Fixed Deadline

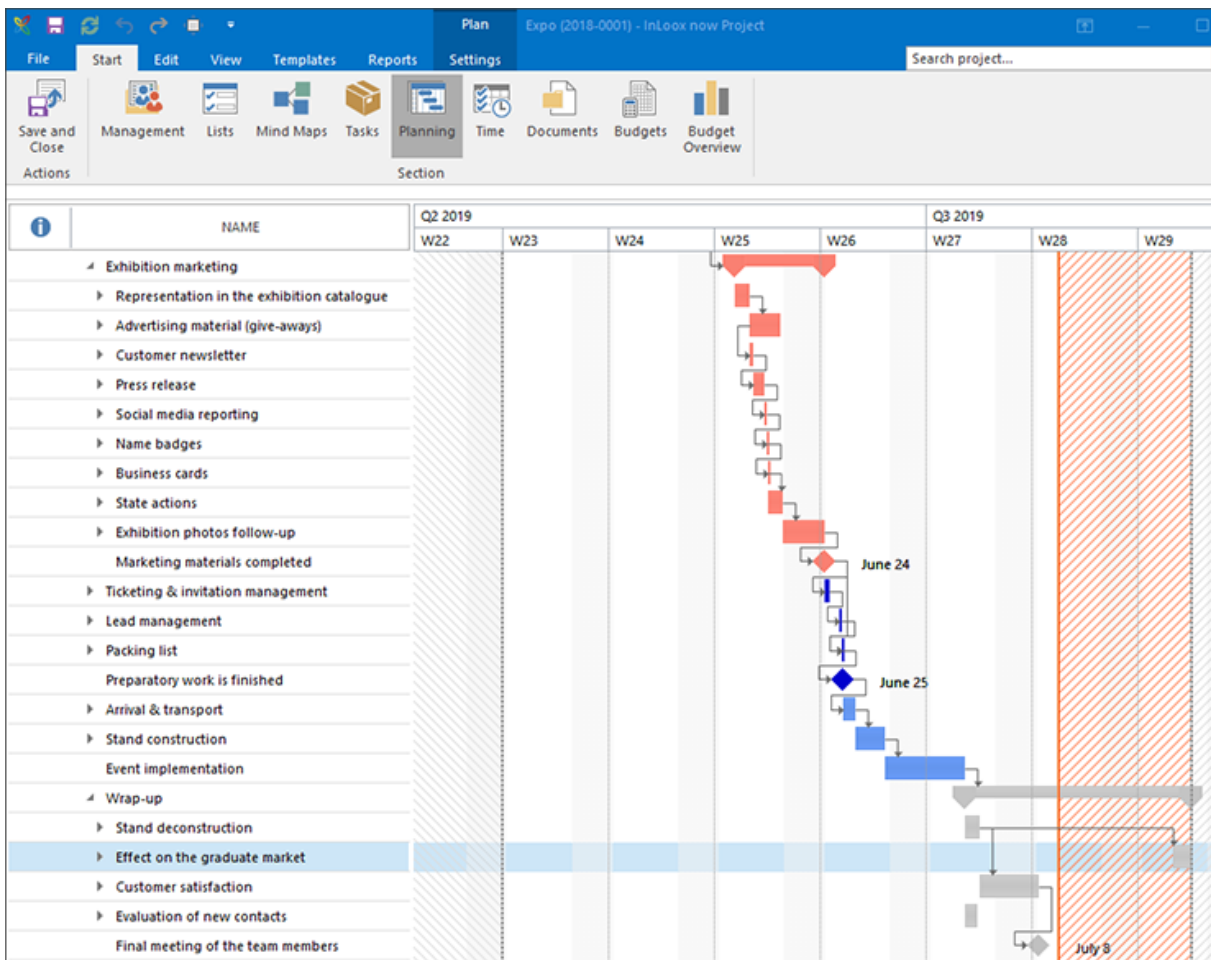
The 'Fixed Deadline' feature provides you with an additional option for visualizing delays that could have a negative effect on the finish date of your project. This feature is useful if the end date of your project marks a fixed deadline. Delayed milestones or activities that lie outside of the planning period are highlighted in an orange shaded field in the project plan.

1. Start from the project overview: To create a new project click in the ribbon on the **Start** tab and on **New Project**. Or double click to open an already existing project.



2. Activate the 'Fixed Deadline' feature in the management view on the **Edit** tab.

The feature highlights all activities that are delayed beyond the project end date (specified on the management page) in an orange shaded field in the planning. See at a glance whether the project can be completed on time or whether delays have negative effects on the deadline.

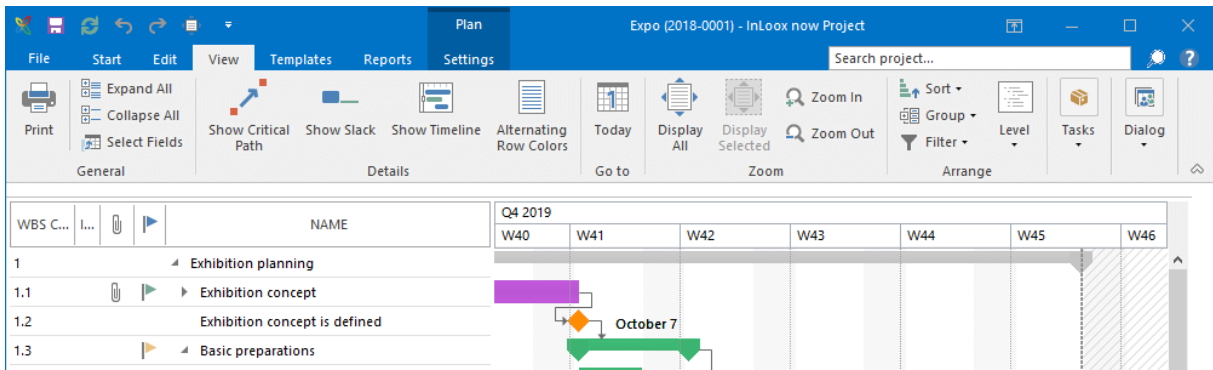


3. You can activate or deactivate the feature at any time in the management view of your project.

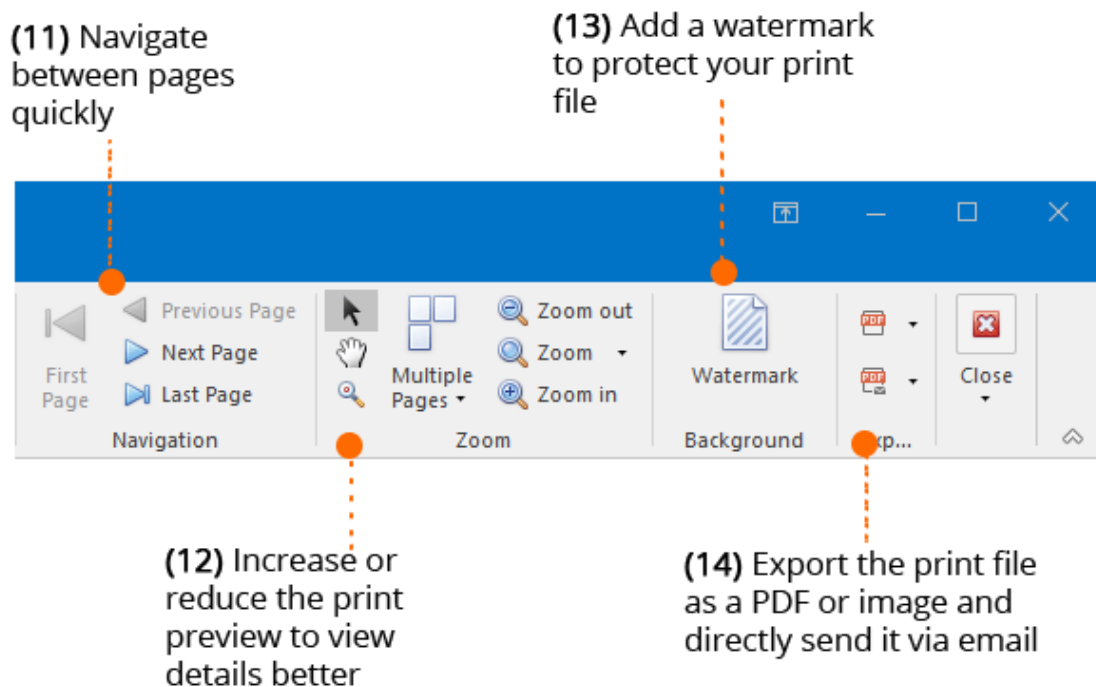
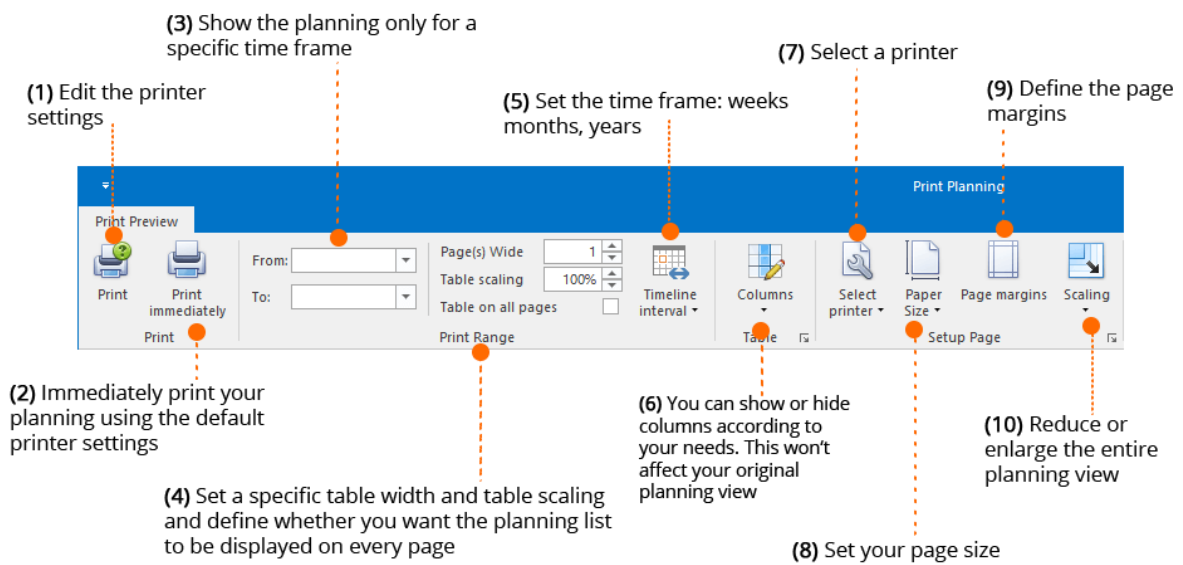
Print planning

1. How to open the print preview

Open a project >> Go to Planning >> Click on the View tab >> Click on Print



2. Overview of the print preview ribbon



3. Print preview features in detail

(1) Print

Edit the printer settings before printing. E.g., determine which pages you want to print or whether you want to print in landscape or portrait mode.

(2) Print immediately

Click on Print immediately to print your planning using the default printer settings.

(3) Time frame

If you only want to print the planning for a specific time frame, you can define it here. E.g., only print the planning elements for the next week for your weekly meeting – so you can keep track of the tasks and activities that have to be done during that week.

WBS CODE (...)	NAME	START	END
1	Exhibition planning	01.10.2019...	08.11.2019...
1.1	Exhibition concept	01.10.2019...	07.10.2019...
1.2	Exhibition concept is defined	07.10.2019...	07.10.2019...
1.3	Basic preparations	07.10.2019...	14.10.2019...
1.3.1	Clarify frame conditions	07.10.2019...	11.10.2019...

(4) Table settings

- You can set a specific **width** for your table by choosing 1-5 with 1 being the default setting. The bigger the width of your table, the more detailed will your print be and, of course, longer.
- You can also customize your table via the **table scaling**. E.g., if you want to see the complete project plan on one page but your planning is so long that it doesn't fit into one page.
- You can also **display the planning list (fields)** on all pages – this allows you to quickly match a bar in the Gantt chart with its activity.

(5) Timeline interval

Determine whether you want the planning to be displayed in **weeks, months or years**.

(6) Display more columns (fields)

You can also **display more columns, i.e. fields**. The changes you make in the print preview won't affect the view of your original project plan.

WBS CODE (...)	NAME	START	END
1	Exhibition planning	01.10.2019...	08.11.2019...
1.1	Exhibition concept	01.10.2019...	07.10.2019...
1.2	Exhibition concept is defined	07.10.2019...	07.10.2019...
1.3	Basic preparations	07.10.2019...	14.10.2019...
1.3.1	Clarify frame conditions	07.10.2019...	11.10.2019...

(7) Select printer

Select a **default printer** – this setting will apply to all projects

(8) Paper size

Print your project plan in **various sizes**.

(9) Page margins

Customize the page margins of your print. Note: There's a minimum margin of 4,32cm

(10) Scaling

Enlarge or reduce your planning view – without changing the printing range.

(11) Navigation

Quickly jump to the right page via the navigation.

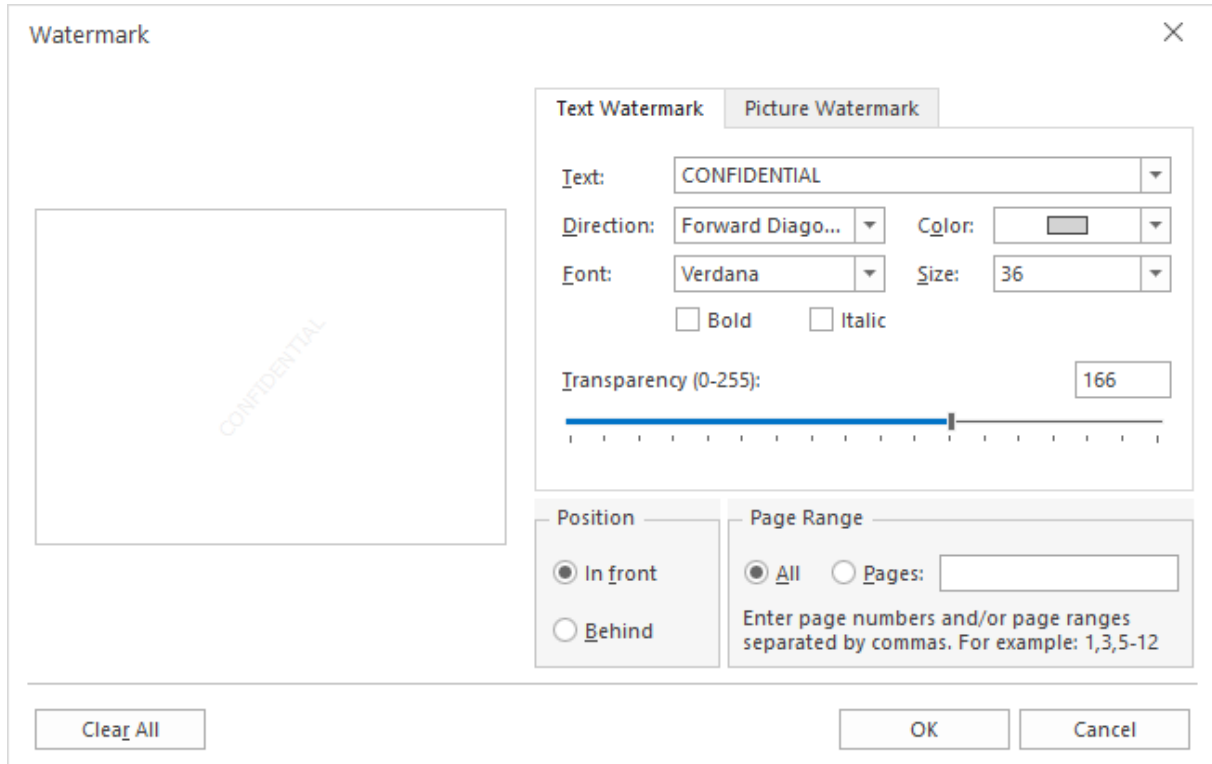
(12) Zoom

Enlarge or reduce the print preview – this won't affect the actual print, it's merely an optical zoom.

(13) Watermark

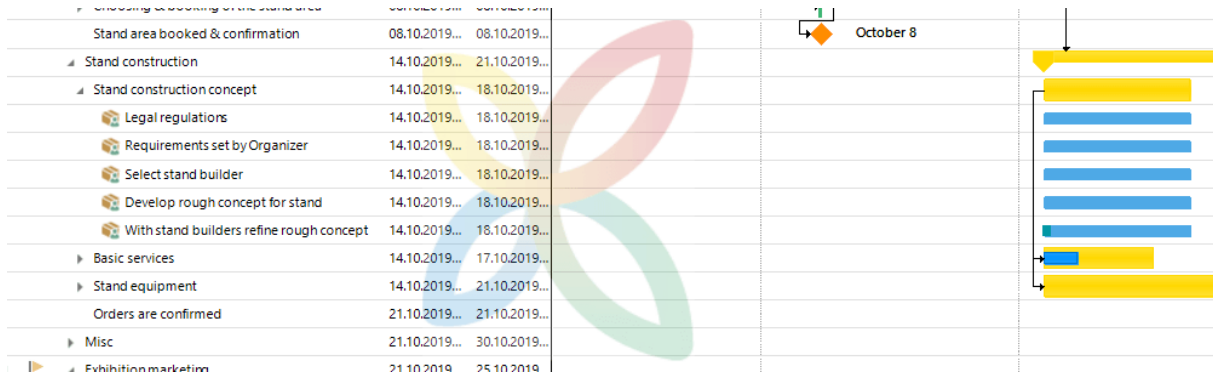
Protect your print documents with a watermark. You can use a **text or picture**:

- If you select **“Text Watermark”** then you can choose between a variety of preset texts or enter your own text.



- You can also use an **image as a watermark**, e.g. your company's logo. Just click on the tab "Picture Watermark" and upload an image.

TIP We recommend using a .JPG file.

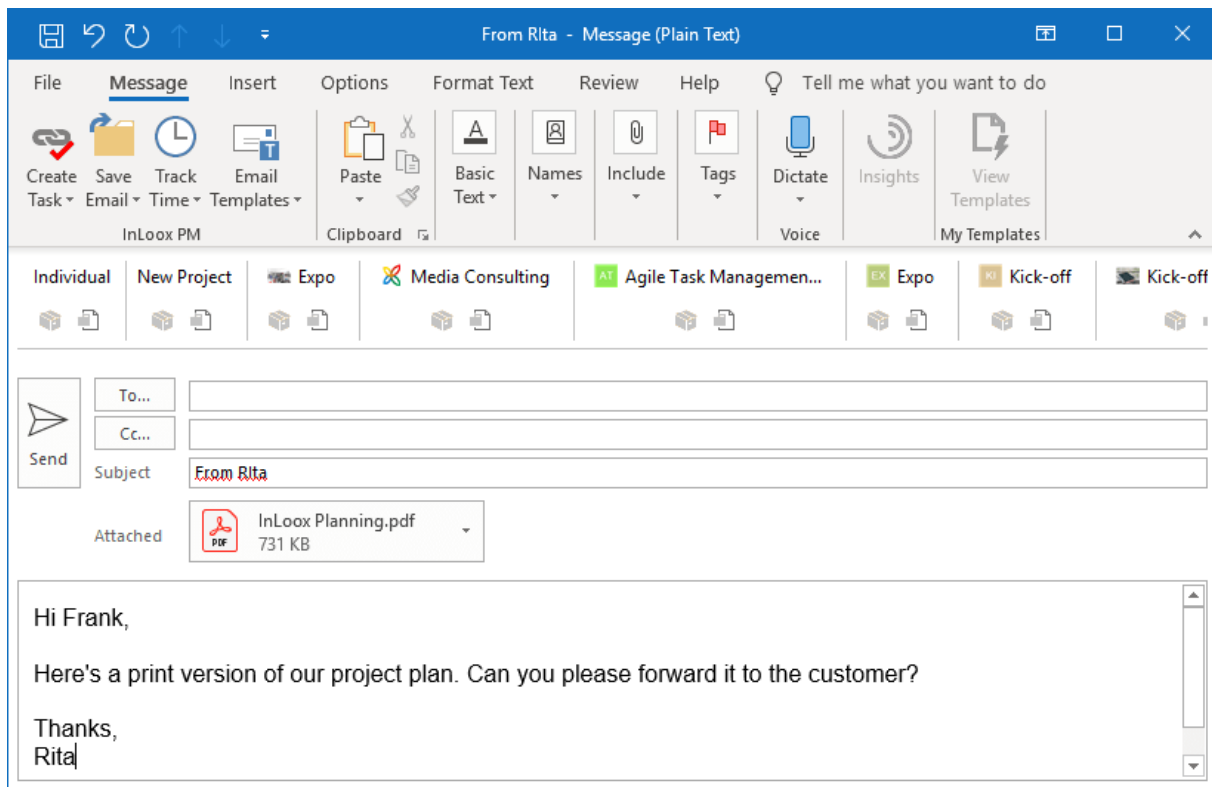


Select the position **“In front”** and **increase the transparency (e.g. 200)** so that the watermark will be shown in the front but won't be too overwhelming.

(14) Export & Send as email

You can export the print of your project plan or send it directly via email.

- Export to PDF**
 Click on the button “Export to” to export your print to PDF. Alternatively click on the arrow to open the dropdown menu and select “PDF file”. Then you'll be able to define the PDF settings. E.g. protect your file with a password or add a digital signature.
- Export to Image file**
 Click on the arrow to open the dropdown menu and select “Image file” to export your print. You can save all pages of your project plan in one file or save each print page in an individual file.
- Send as email**
 You can also send your print via email. Click on the button „Email as”, to send the file as a PDF. Or click on the arrow to open the dropdown menu and select “Image file” to send the print as an image file. You can customize the PDF and image settings as described above. Before you can send the file via email, you'll have to save it locally first. After you have selected a storage location, a new email window opens with the print file attached.



Project-related tasks

Warning As of version 9, work packages have been renamed tasks.

Project-related tasks are tasks that belong to a specific project. In InLoox, you can use the Kanban method to manage these tasks.

Please watch our [video tutorial](#) for an introduction into the Kanban method.

In project management, Kanban is a method to visualize tasks and to manage the flow of work. Tasks are divided into three categories that are displayed on a three-column board: To Do, In Progress, Done. The status of tasks and competences are always clear. In the classic Kanban method, tasks are not scheduled, but in InLoox you have the option to create tasks with and without a deadline.

Create, edit and delete project tasks

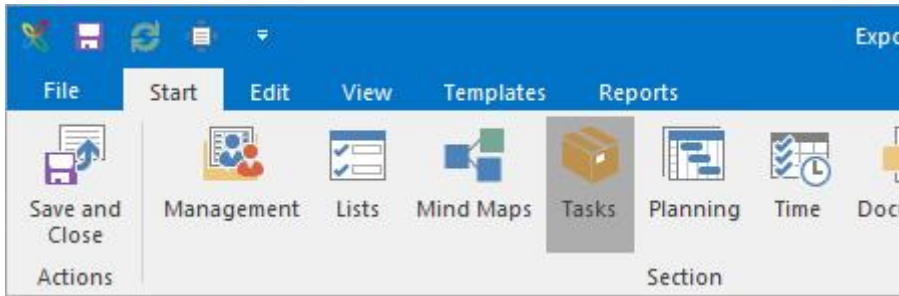
There are several ways to create project tasks in InLoox:

- Copy tasks from a project mind map
- Import tasks from a template
- Create tasks manually

You can also combine all three methods. In this chapter we look on the topic of manual task creation.

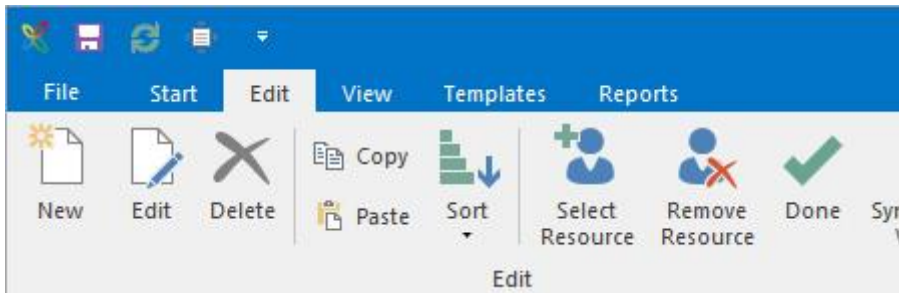
Create tasks manually

1. You are in your InLoox project for which you want to create a new task.



2. Click in the Ribbon on the **Home** tab on the **Tasks** button.

3. Now, click in the Ribbon on the **Edit** tab on the **New** button. The new task will then be displayed in the left column of your Kanban board.



Alternatively, you can click on the **plus sign in the respective column** to add the new task directly to this column.



You can now also edit the task in the editing side panel on the right.

Basic Information

Name: Hall and stand position set

Description: For details see attachment

Effort: 1 Work Days ⓘ

Resource: Gordon Newman ... ▾

Start: 08.10.2019 12:00 (from Activity) ▾

End: 08.10.2019 14:00 (from Activity) ▾

Documents

New link...

Flyer.docx ✕

Budget

Group: Consulting ▾

Billable

Individual

Notifications

Rita Meyer ... ▾

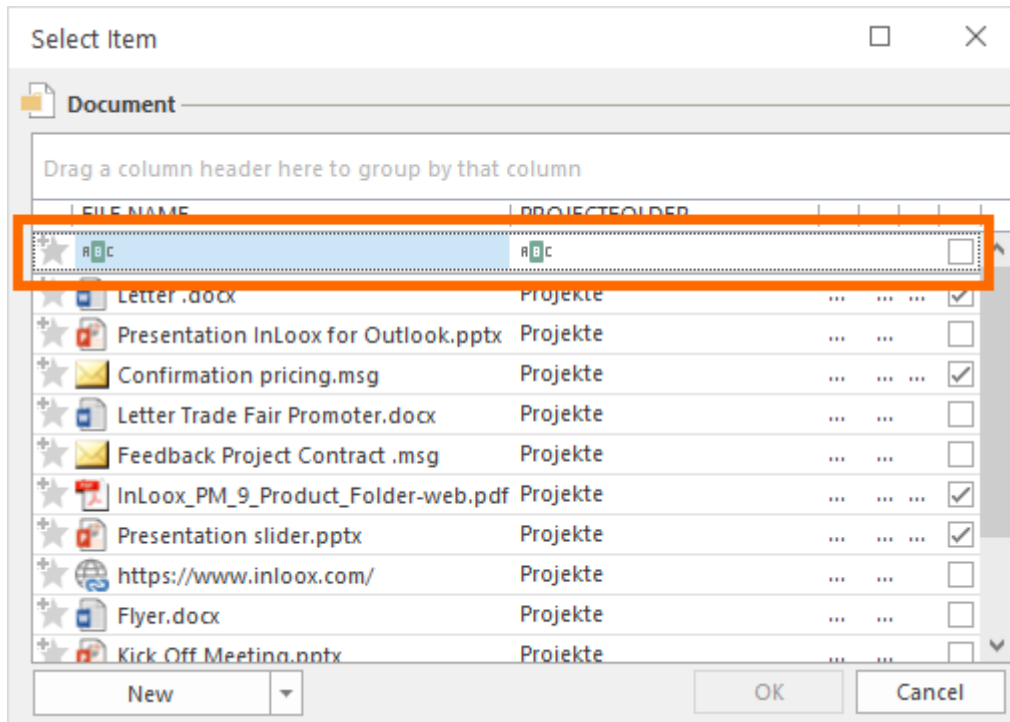
Custom

Priority: ▾

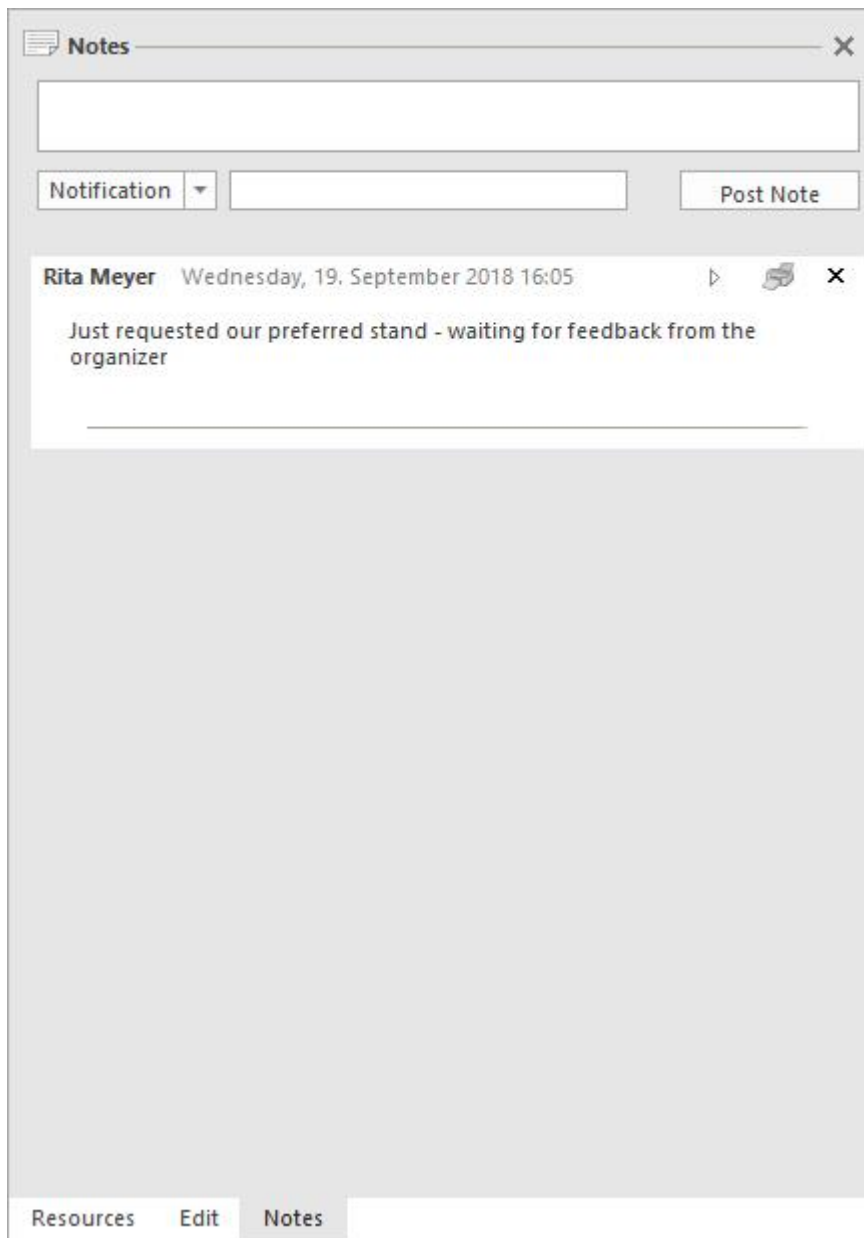
- **Name and description:** Enter a name for your task and describe the scope of the task.
- **Effort:** Enter the estimated effort for the task. With a click on the little arrow, you can change the format from hours to working days (equals 8 hours by default).
- **Resource:** You can assign a resource to the task, but you don't have to. In classic Kanban, team members choose the task that they want to work on next themselves from the To Do column. For a quick selection of frequently used resources, click on the little arrow, for the global address list, click on the three dots next to the resource field. Now select the person who is supposed to be in charge of the task. You can only enter one resource per task.
- **Start/End:** You can give you task a time frame, but you don't have to. If you want to specify a certain start and/or end date, click on the arrow next to start or end and select a date and a time. When you add the task to an activity in the project schedule, the task will adopt the start and end date from this activity automatically. You are able to change that manually. Warning: In this case, we recommend to schedule the task within the time frame of the activity to which the task belongs.

- **Documents:** If certain documents are related to the task you can add them to the task by clicking on New link... in the documents section. You will get an overview of all project documents that have already been added to InLoox and for which you have a reading permission. If there aren't any documents in your document library yet, you can upload a new document and add it to the task by clicking on New, selecting a document from your computer or from your file server and confirming with OK.

Tip If you want to link a document to a project element but you have a large number of project documents, you can search for the respective document in the document list. To do this, simply click on the column above the respective column heading in the document dialog and enter the search term.



- **Budget:** You can assign the task to a certain budget group. In InLoox, there is an internal price per hour stored for each budget group. This price is used if the task is assigned to a budget group. The InLoox Administrator can set the budget groups in the InLoox options. The Billable check box is activated by default. This means that for the hours of work that go into the task, a planned expense for the resource costs is created in the project budget. Later, you can generate an actual revenue in the project budget for this expense. If you remove the check, it is not possible to bill the expense later. Activate the Individual check box to ignore group rates and specify the purchase price and the sales price for the individual hourly costs of the resource.
- **Notifications:** The resource the task is assigned to receives a notification about the task automatically. In the notifications section, you can inform other people such as the project manager or a proxy about changes made to the task. Click on the little arrow to get a quick selection of frequently used resources or on the three dots to get to the global address book. The InLoox Administrator determines in the InLoox options if and when a resource gets notified.
- **Notes tab:** Starting in version 10.2, task notes are now displayed in a new tab in the task side panel.



- Don't forget to **save your new task**: Click on the File tab in the upper left corner and then either on Save when you want to save the task, but want to keep working on the project or on Save and Close when you want to save the task and leave the project. You'll also find your project-related task in the global project list where it is visible for anyone who has reading permissions for the task.

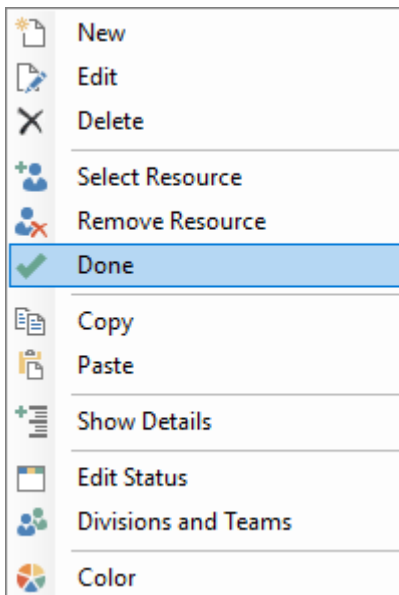
Edit tasks

You can edit an already existing task by **double-clicking the task** or, alternatively, by clicking on the **Edit** tab on the **Edit** button in the Ribbon. This will open the side panel that you already know from creating a new task. You can now edit the task.

Starting with version 10.2, you can quickly **edit certain task information inline**, such as task name, start date, effort or resource, depending on the size of the card.



If a task is done you can mark it as such by clicking on the **Home** tab on the **Done** button in the ribbon. You'll find the same command in the context menu that you can open by right-clicking on the task, then select **Done** in the menu.



When a resource marks a task as done, all persons who have been added to the notifications field will be informed about it. The task will be moved automatically to the Done column / the outer right column of the Kanban board. The completed task will be reported back into the project plan and is included in the calculation of the project progress. If the project manager marks the task as done, the resource in charge of the task and all the people in the notifications field will be informed automatically about it.

Tip When your project contains several similar tasks, you can **copy tasks**. Click on the task, then click on the Edit tab on the Copy button in the ribbon, then on the Paste button.

Warning If the original version of the copied task contains constraints from an activity in the project schedule, these constraints won't be adopted into the copied task. Start and end dates that were set manually, however, will be adopted into the copied task.

Delete tasks

You can delete tasks by clicking on the task that you want to delete in the Kanban board, then on the **Home** tab on the **Delete** button in the Ribbon. You'll also find this command in the context menu that you can open by right-clicking on the task that you want to delete.

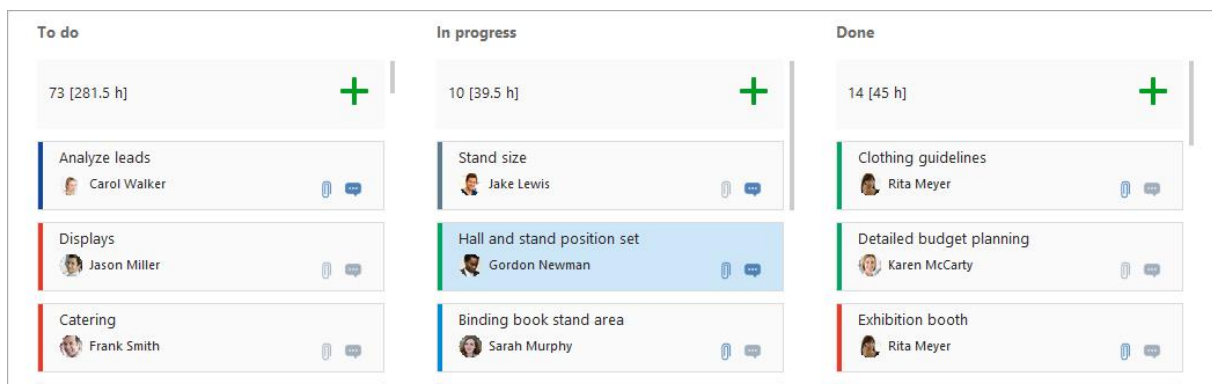
When you delete a task, the people for which you have set up notifications will be informed about it. If you are the manager of the project and you delete another resource's task, the person will be also informed. Deleted tasks are removed permanently, you cannot restore them.

Tip When you want to delete several tasks at once, you can use multi-select. Keep the CTRL key on your keyboard pressed down while selecting the tasks that you want to delete with your mouse. Then select Delete in the ribbon.

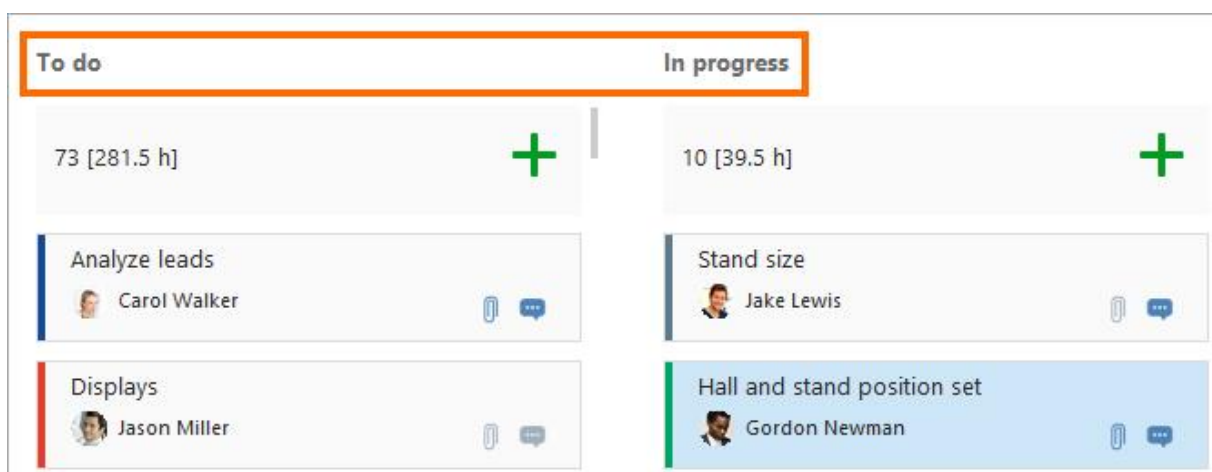
Team task management with Kanban

How a Kanban board works

Read the Kanban board from left to right: On the outer left side, there are always the tasks that yet need to be done, also known as the [Backlog](#). On the outer right side, there are always the completed tasks.

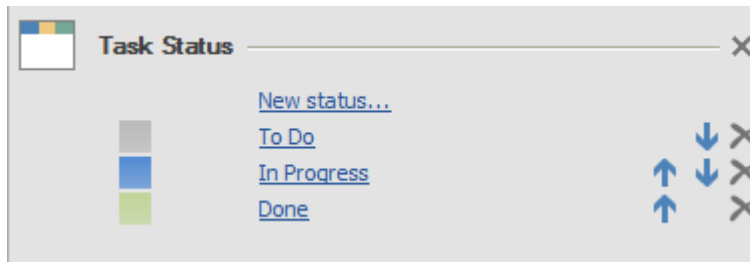


In each status column the hours of all tasks in the column are added up. This is useful if, for example, you only have a certain number of hours reserved for the project. This feature gives you a quick overview of the estimated workload of all tasks in the project without having to open the dashboard. As soon as you move a task to another column, the number of hours in the respective status column automatically adjusts.



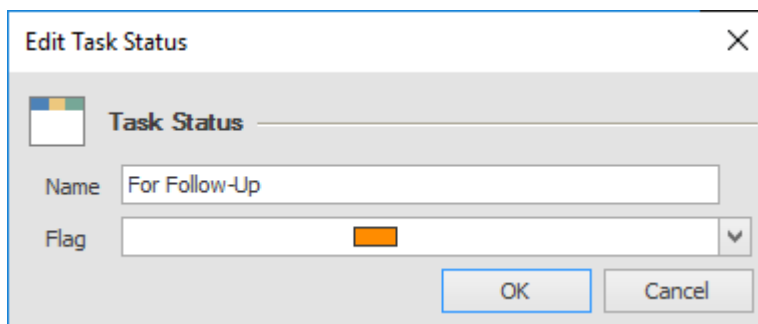
Edit or delete a status

You can customize the names and the number of columns to suit your needs. Click on the **Edit** tab on **Edit Status** in the ribbon. This will open a side panel on the right:



Click on **New Status** to add another column to the view. You can now name the new column and assign a color. Your Kanban board now would have four columns.

You can also edit the already existing columns/status. In the side panel, click on the status that you want to edit and change the name and the color in the dialog. The color helps you to identify tasks with the same status.



Use the arrows to change the order of the Kanban columns – the highest entry is the outer left column, the lowest entry is the outer right column. Click the cross to delete columns.

New tasks always appear in the outer left column. You can drag them with your mouse in another column to change their status and their color. If for example a team member starts to work on a task, he or she can drag the task from the *To Do* column into the *In Progress* column. This helps the entire team to see who is currently working on which task. As soon as you drag the task into the outer right column, it is marked as done.

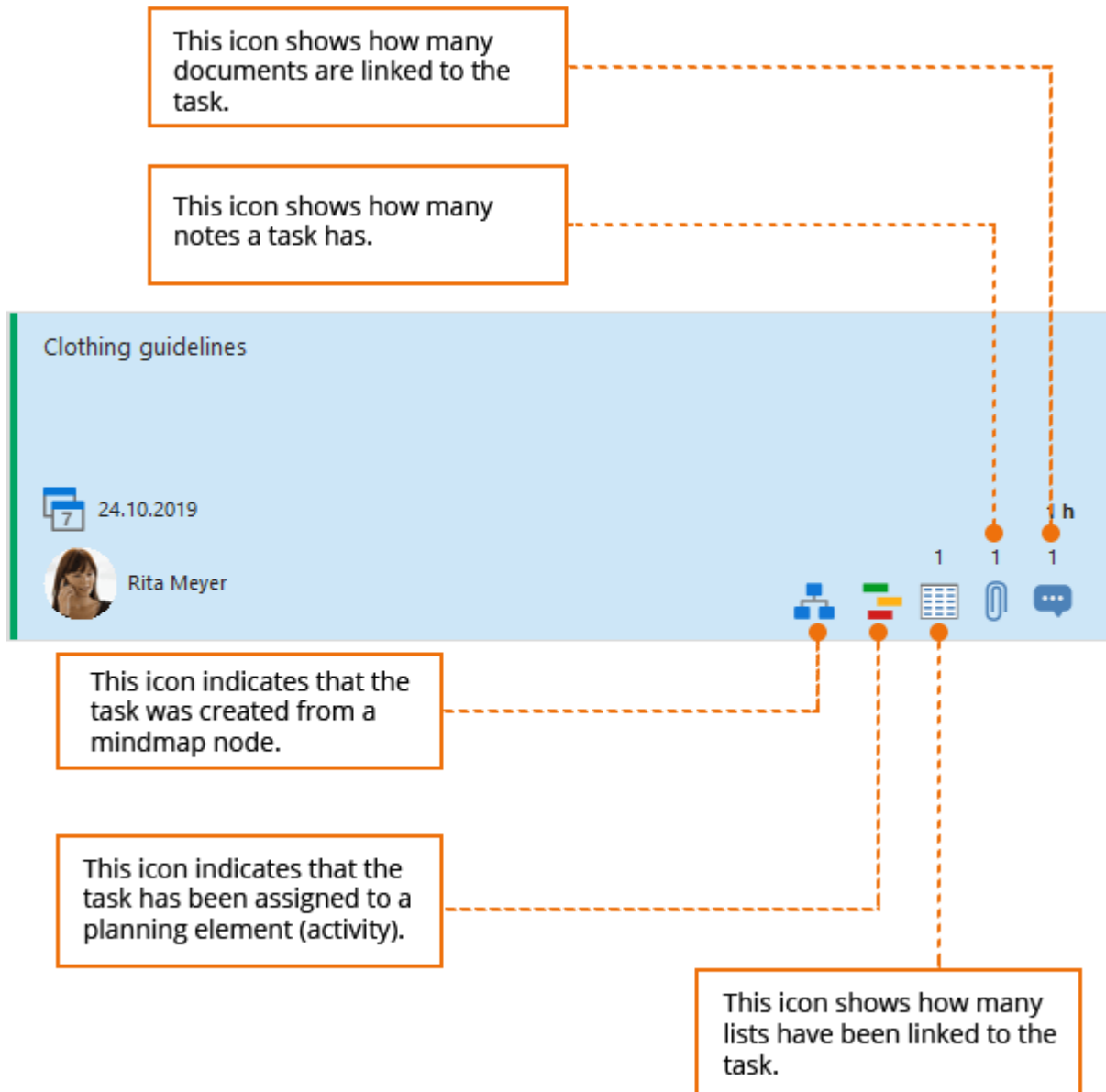
Overdue tasks are displayed with a red start and/or end date. The following task should have already been started, but is still in the *To Do* column.

Warning No matter how you name and arrange the columns – in InLoox, the tasks in the outer left column are always filed as undone and the tasks in the outer right column are always filed as done.

Note Adjustments to the Kanban board are always visible for the entire project. If you want to determine a Kanban structure for the entire project platform (across projects), the InLoox Administrator has to change the settings in the InLoox options.

Meaning of the icons on a Kanban card

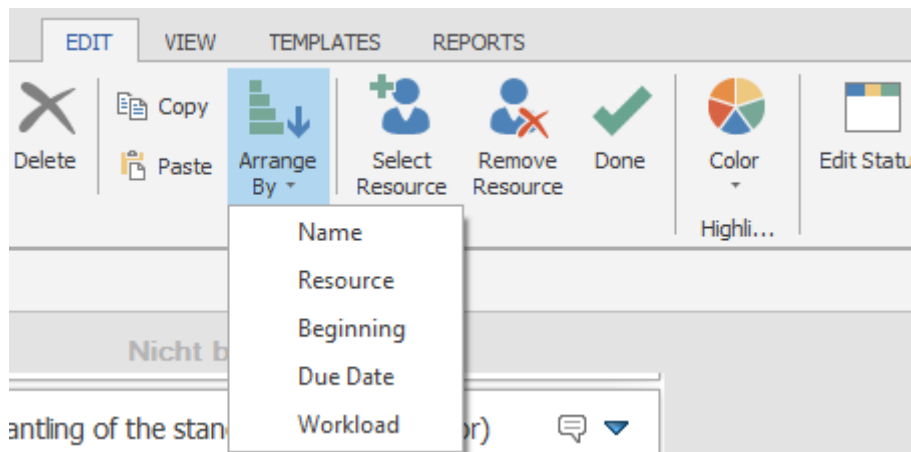
You can see directly on the task card, whether a task has been added from a mind map node and/or if it has been assigned to an activity in the project schedule. Click on the regarding icon to get directly to the mind map or to the related planning activity. You can also see from the icons how many lists, documents and notes a task has.



Customize the task view

Sort tasks

You can arrange the task cards on the Kanban board by different criteria. Click in the ribbon on the **Edit** tab on **Arrange By** and select the criterion by which you want to arrange the tasks. This arrangement is only visible to you, not project-wide or system-wide.

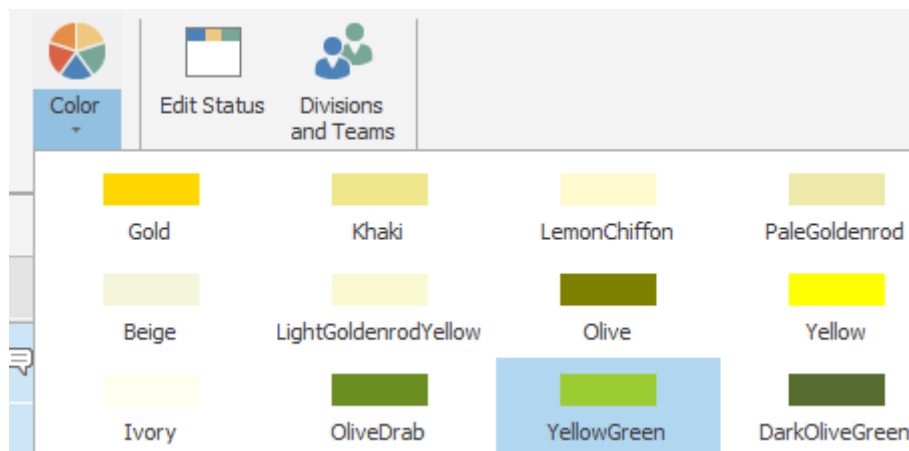


If you arrange the tasks by due date, you have an overview of which tasks are due first.

Color

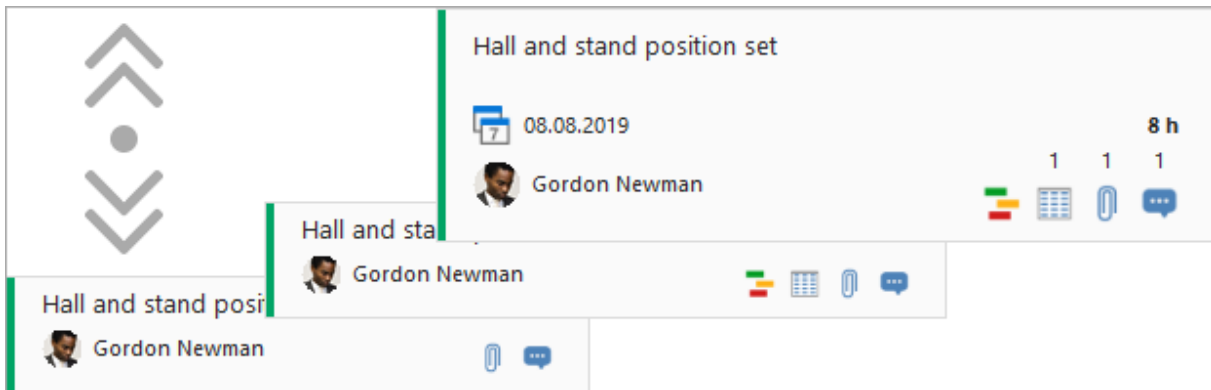
You can assign an individual color to each task which overwrites the color of the task status. This helps you to highlight individual tasks and to mark specific tasks that are important to you. Again, the coloring of the tasks is only visible to yourself and not to other users on the same project platform.

Click on the task that you want to highlight. Then click in the ribbon on the **Edit** tab on **Color** and select a color.



Show details

You have always been able to collapse and expand the task cards. The new Kanban in Version 10.2 allows you to adjust the card size according to your information needs. Simply hold the CTRL key and scroll up and down simultaneously with your mouse to enlarge or reduce the size of the cards. You will see more or less information depending on the size of the card.



Filter

You can use the full-text filter to select specific tasks. You can e.g. filter by the name of a resource to display only the tasks that this person is responsible for or you can filter by a certain keyword. Click in the ribbon on the **View** tab on the **Filter** button and enter the keyword in the text field by which you want to filter the tasks.

Click the funnel icon in the View tab to filter tasks.

Click on *Clear* to delete the filter.

stand

Clear

To do

74 [283.5 h]

Selection of the **stand** personnel
Christina Hampton

In progress

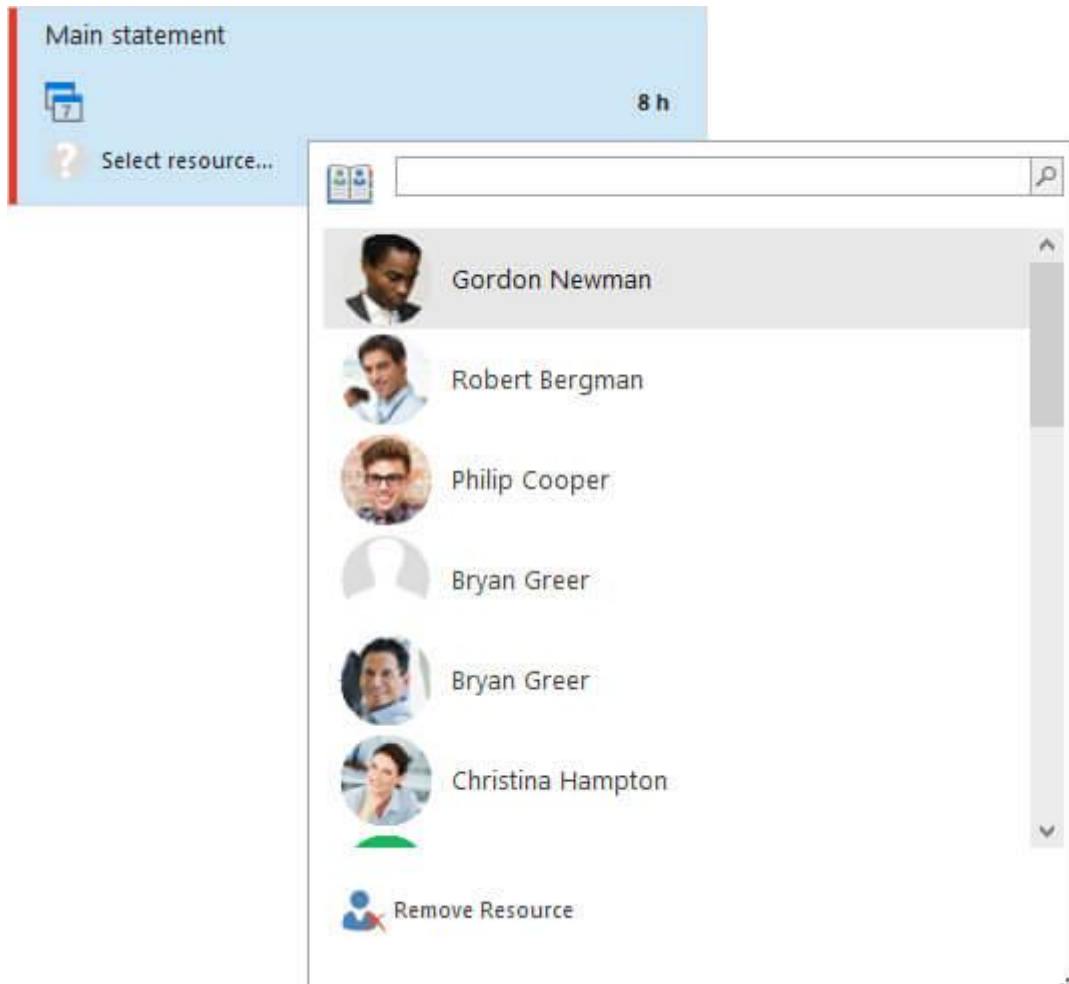
10 [39.5 h]

Stand size
Jake Lewis

Enter a search term (e.g. the name of a resource) and click the enter button to confirm your search.

Assign tasks to resources

To assign a task to a specific person, click on the task card on the image or alternatively on **Select resource...** and select a resource from the dropdown menu. You can also search for a specific resource via the search field. Click on the address book icon to open the global address book and select a resource from there.



If you want to assign the task to another person, you can simply click on the **image or resource name** again and select the new resource from the list. To remove a resource, click **Remove resource** at the bottom of the resource list.

Tip You can filter the resources in the global address book by specific skills, e.g. when the task can only be completed by someone with English language skills. Please go to the chapter Skills to learn how to assign specific skills to a resource.

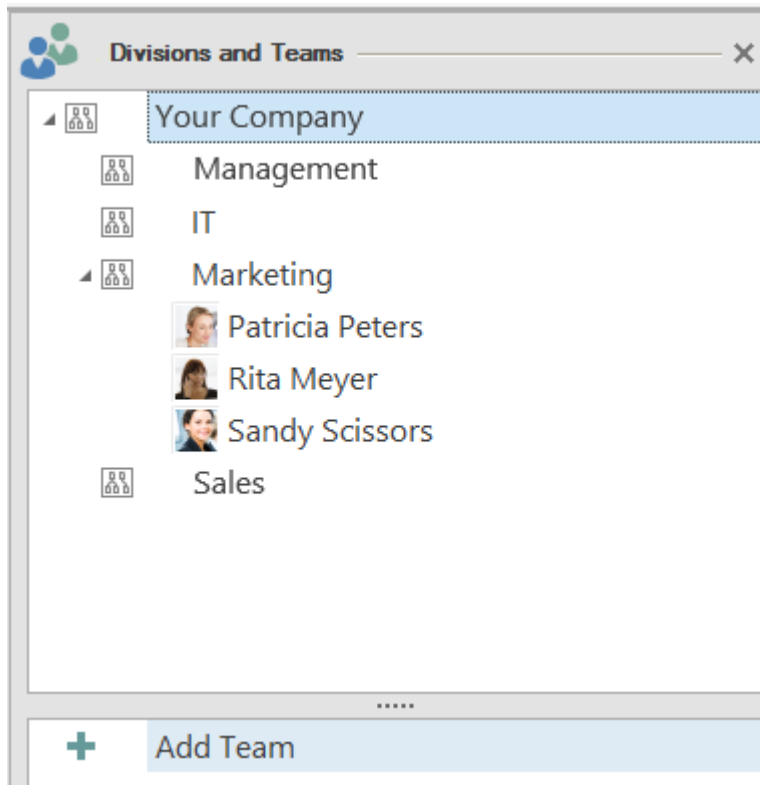
Divisions and teams

Warning The division and team functionality is only available in InLoox 9 Enterprise Server or in InLoox now! Enterprise.

If you are able to choose from a multitude of resources the divisions and teams view helps you to keep a better overview.

If you want to assign a task to a resource from a specific division, please follow these steps:

1. Click in the tasks section of the project on the **Edit** tab and in the ribbon on the **Divisions and Teams** button.
2. This will open the Divisions and Teams overview in the side panel on the right.
3. The InLoox Administrator can set the division and team structure in the InLoox options.
4. You can expand the division structure by clicking on the black arrow in front of the division icon to see all resources that belong to that division

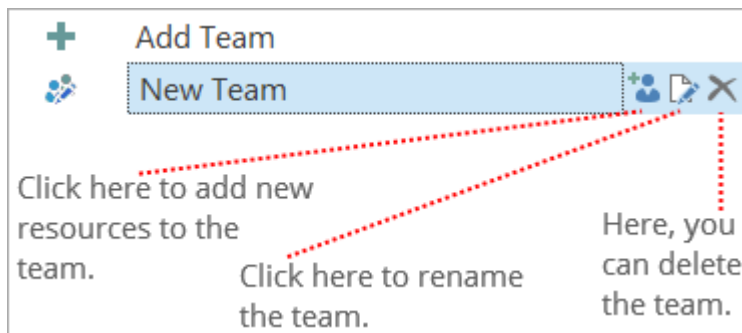


5. Now drag the respective resource on the task that you want to assign.
6. The workload of the task will now be included in the calculation of the resource's workload and in the workload of the division.

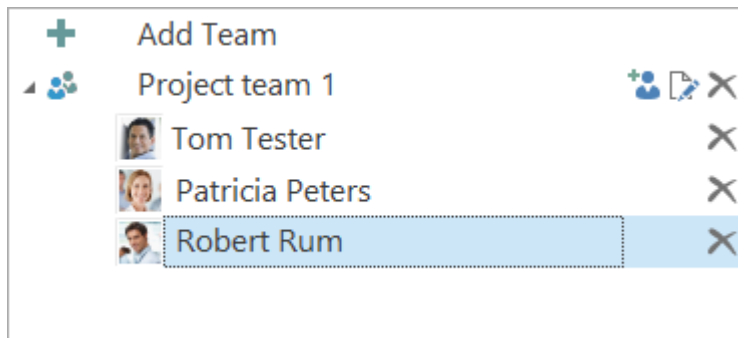
Besides the divisions that the InLoox Administrator sets for the entire project platform, you can create your own teams in InLoox and track their workload. The team functionality helps you to put resources together across divisions.

Please follow these steps to create a team in InLoox:

1. In the tasks section of a project, click the **Edit** tab and in the ribbon on the **Divisions and Teams** button.
2. In the Divisions and Teams side panel, click on the plus symbol left of **Add Team**. A new team will appear below.



3. Now you can drag and drop resources from your team onto the respective tasks.



4. The workload of the task will now be included into the calculation of the resource capacity and in the calculation of the team capacity.

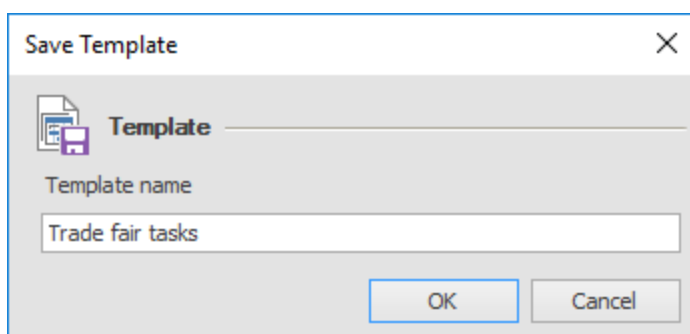
Note The new team is available in each of your InLoox projects, but it is not available system-wide – meaning that your colleagues won't be able to use the team. Every user can create his or her own teams.

Task templates

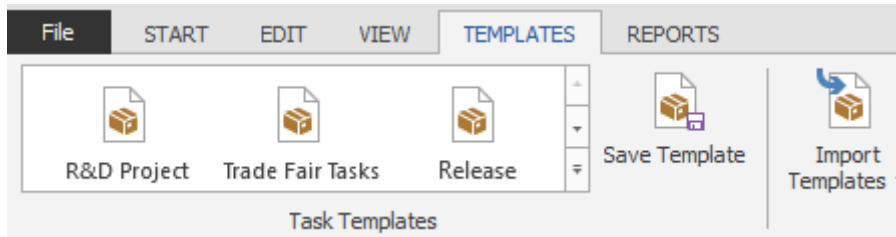
If a certain task set plays a role in many of your projects, you can save them as a task template. This can for example consist of tasks that your project team has to do each time your company takes part in a trade fair or whenever you launch a new product. With task templates, you don't have to create these tasks over and over again, but only make adjustments for your current project.

Save and load task templates

1. First, create the tasks that you want to use in your template in an InLoox project. Learn here how to create new tasks.
2. To save a task template directly in InLoox in the gallery view, click in the project in the tasks section on the **Templates** tab and on the **Save Template** button in the ribbon. Name the template and confirm with **OK**.



- The task template is now available in all of your InLoox projects in the gallery view in the ribbon. You'll find the gallery view in the project in the **tasks** section on the left side of the ribbon on the **Templates** tab.

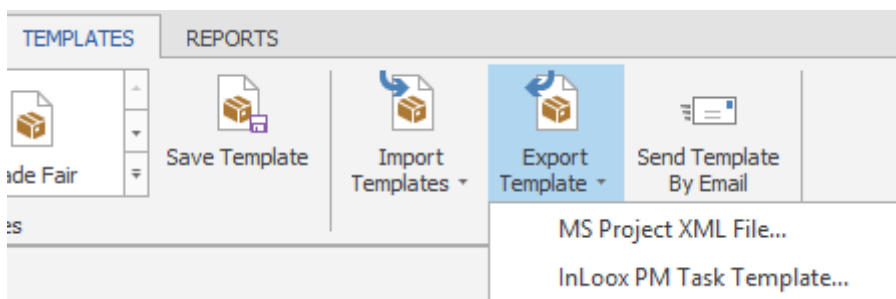


- To load a template from the gallery view into your project, you just have to click on the template you want to load in the gallery. If there aren't any tasks in your project yet, you will then see the tasks from your template in the Kanban view which you can edit further there. If your project already contains some tasks, the tasks from the template will be added.
- The InLoox Administrator can re-name, delete, export and import task templates from the gallery view in the InLoox options. On the InLoox website in the [Download](#) area, we have prepared some ready-to-use templates that you can import into all of your projects.

Export and import task templates

If you don't want to save a task template in InLoox, but on your own computer, you can export it. This is recommended if you want to import it into Microsoft Project or to use it in another InLoox database.

- Create a set of tasks in an InLoox project that you want to save in a template and re-use in another project.
- Now click in the **tasks** section of your project on the **Templates** tab on the **Export Template** button in the ribbon. You have now the option to export the file as an MS Project XML file (recommended if you want to re-use it in Microsoft Project) or as an InLoox PM task template file (recommended if you want to re-use it in InLoox). Please select one option



- Select the place on your computer or file server where you want to save the file, name and save the template.
- To import a task template, click in the project in the **tasks** section on the **Templates** tab on the **Import Template** button in the ribbon. You can import Microsoft Project files as well as InLoox task template files. Please select the file format and choose the regarding template from your computer or your file server.
- If there are already tasks in your project, the tasks from the template will be added.

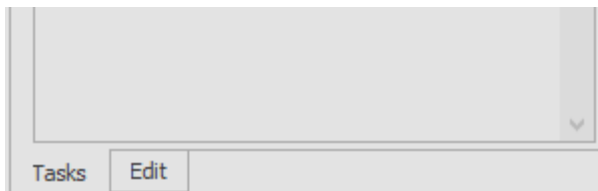
You can also send a task template directly out of InLoox via email. Click in the project in the tasks section on the **Templates** tab and then in the ribbon on **Send Template By Email**. This command opens an email which already contains the task template as an attachment (InLoox task file).

Add tasks to the project schedule

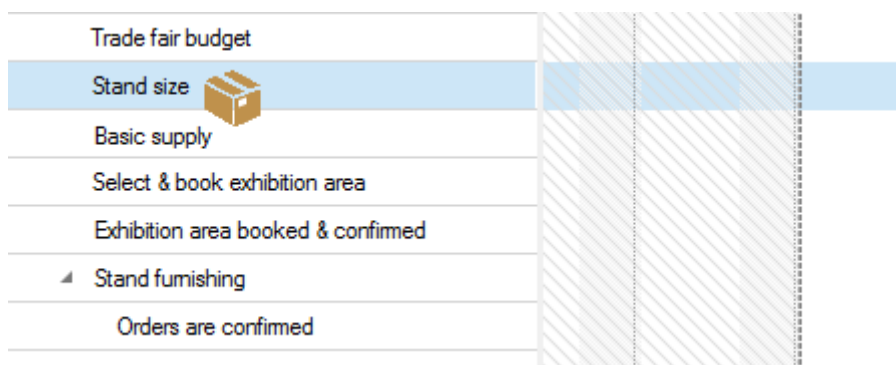
If a project schedule (Gantt plan) is a part of your project you can also assign project-related tasks to the regarding activity in the schedule. We recommend this if a task is supposed to be completed within the time frame of this activity and if its content is related to the content of the activity. You don't, however, have to assign a task to an activity, you can also use it as a "free task" in your project.

Please follow these steps to integrate a task into your project schedule:

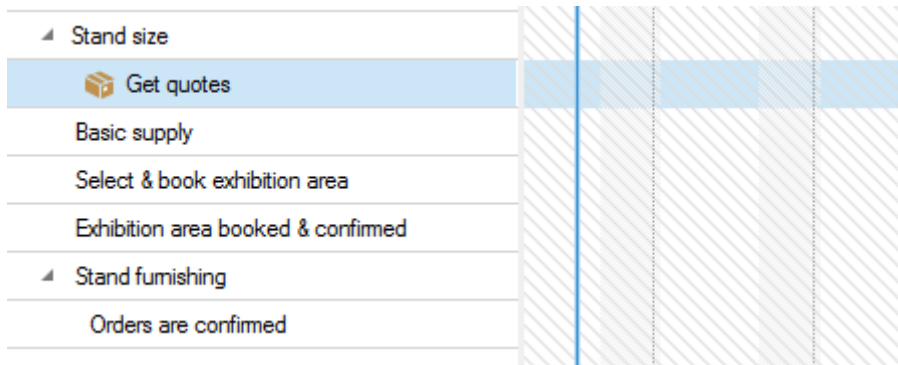
1. Go to the planning of your project. Therefore, open your project and click on the **Home** tab in the ribbon on **Planning**.
2. Double-click on the activity, summary activity or milestone that you want to assign your task to. This will open the side panel on the right to edit planning elements.
3. At the bottom of the side panel, select the **Tasks** tab.



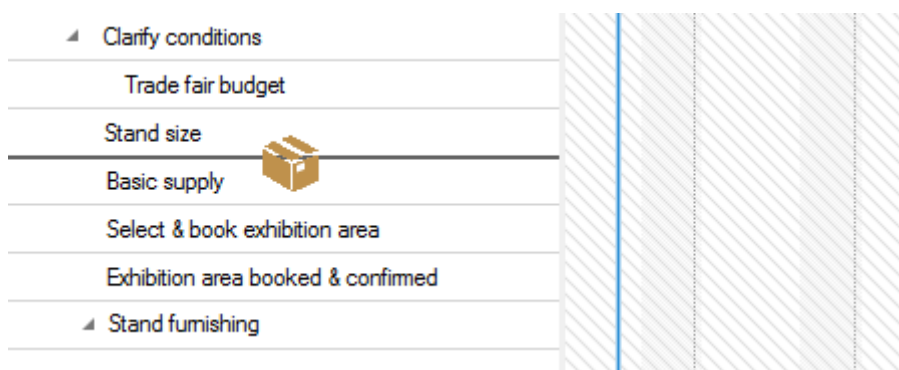
4. You will now see an overview of all the tasks in your project that have not been assigned to a planning element in the Gantt chart yet.
5. Now drag the regarding task with the mouse from the side panel onto the respective activity or milestone.
6. You have different options:
 - Drag the task onto activity or milestone so that the line of the element is highlighted. Then let go of the task. It will then be shown as a sub-task to this activity or milestone in the plan.



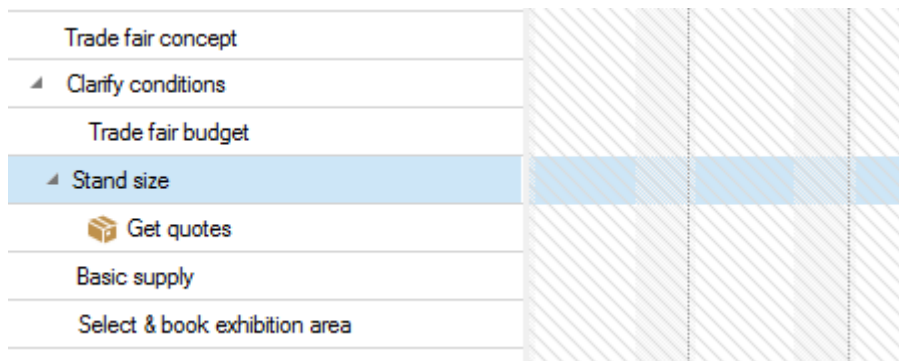
The task will then appear in your Gantt Chart.



- You can also convert a task into a planning element. Drag the task from the side panel onto the place in the planning list where you want to create the new activity. A black line will appear in the planning list. Then let go of the task.

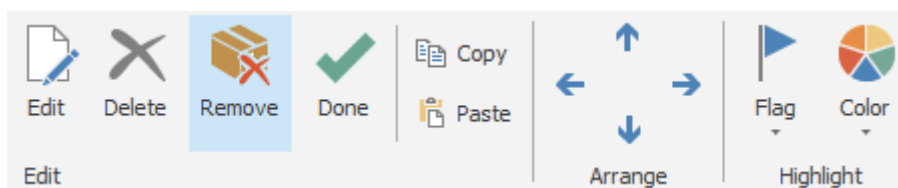


You will see a new activity to which the task is assigned.



- You can also drag the task from the side panel onto a summary activity. This creates an activity below the summary activity, which has the same name as the task. The task is assigned to this activity.

When you want to remove a task from the Gantt chart, you mark the task in the planning list. Then click in the ribbon on the **Edit** tab on the **Remove** button.



The task will then reappear in the side panel.

When you are done editing your project tasks, click on the **File** tab and then on the **Save** button if you want to keep editing other sections of your project or on the **Save and Close** button to leave the project.

Add multiple tasks to the project schedule via drag and drop

You can add one or more tasks to the project schedule at once using drag and drop. You can select multiple tasks by holding down the Shift key or CTRL key and simply drag the tasks into the project schedule.

Drag & drop multiple unassigned tasks directly into the project schedule via multiselect (hold Shift- or CTRL-key).

NAME	Q2 2018				
	W22	W23	W24	W25	W26
in planning Z					
refabricates					
re featurefor c...					
isation structure					
ck organisation ...					
ition stand					
regulations					
ion					
cing					
nection to the...					
se companies					
ional					
raregional					
ional					
panies are cho...					
icing					
rance prices					
Entrance prices					

Unassigned Tasks

Search tasks

- Check organisation structure
 - Rita Meyer
 - Effort: 0.00 hours
- Plan sponsors
 - Rita Meyer
 - Effort: 5.50 hours
- Client services
 - Bryan Greer
 - Effort: 8.00 hours

Tasks Edit

Reports

By using InLoox reports you can structure project information and export it for people, who do not use InLoox themselves. Therefore, you can either use standard InLoox reports or, design individual project reports using the InLoox Reportdesigner.

InLoox reports are accessible from the project overview (global reports with filters) and directly from within a specific project (project-related reports):

- **Global reports:** InLoox PM or InLoox now tab >> Projects >> Start tab >> Reports
- **Project-related reports:** Open a specific project from the project overview >> Report tab

Tip: As reports and especially the Reportdesigner provide very extensive and complex features, we recommend an online where you will learn how to design report templates and where we will give you a broad knowledge about the functionality of the report designer. For more information on the online training and the booking process, click [here](#).

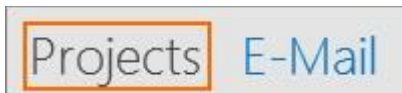
Create standard reports

InLoox offers two possibilities for creating standard reports: in the project overview (global reports with filters) and within a specific project (project-related reports). Additionally, InLoox provides you with a set of standard reports included in the standard InLoox license.

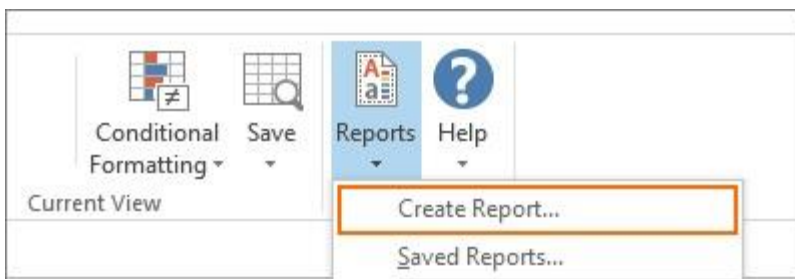
Create global project reports

For global project reports you can use all data of all projects you have access to. However, you can select data from a specific project, too.

1. Click on Projects in the Outlook navigation bar, to open the project overview.



2. Afterwards, open the **Start** tab and click on **Reports >> Create Report**.



3. A new window will open. Therein you determine the project/projects you want to include in your report.

- **All Projects:** Data of all projects you have access to, will be included in the report.
- **Selected Projects:** First, mark all projects you want to include in the project list and then click on **Create Report**. Now, you can choose **Selected Projects** in the new window and all projects you have marked before in the project list will be included. Tip: To select multiple projects at the same time, press the **CTRL**-Button on your keyboard and select the projects from the project list.
- **Only projects matching:** Here you can include projects by filtering by criteria like project number, project name or customer. For example: If the project number includes the year and you only want to include projects from the year 2016 to you report, you enter "2016" in the field **Number contains**.

4. Moreover, you can include project requests by ticking the check-box **Include project requests**. In the case of project requests some of the default reports do not make sense, because usually project requests do not contain very much information expect information from the management page.

5. Choose the template you want to use.

>> Afterwards, you can create filters in the areas Tasks, Planning, Time and Budgets within this window.

Create project-related reports

To create a report with respect to a specific project, proceed as follows:

1. Click on **Projects** in the Outlook navigation bar, to open the project overview.



2. In the project overview, double-click on the project you want to refer to in your report. The project will be opened.
3. Afterwards, click on the **Reports** tab and then on **Create Report** in the ribbon. The report will refer to the project that is currently open.



4. Choose the template you want to use.

>> Afterwards, you can create filters in the areas Tasks, Planning, Time and Budgets within this window.

Standard InLoox reports

For both - global project reports and project-related reports – you can choose from report templates which are included in the InLoox standard license. (If the report templates are not installed on your computer yet, read [here](#) how you can download them.)

Budget overview

Project Overview				
Budget Overview of May 16, 2017				
Project: (2017-0018) Customer and Partner Event 2017				
Planned expenses (resources)	Planned expenses (other)	Actual expenses (time tracking)	Actual expenses (other)	Planned revenues
0.00 €	0.00 €	0.00 €	0.00 €	0.00 €
0.00 €	0.00 €	0.00 €	0.00 €	0.00 €
0.00 €	0.00 €	0.00 €	0.00 €	0.00 €
240.00 €	0.00 €	80.00 €	0.00 €	0.00 €
240.00 €	0.00 €	80.00 €	0.00 €	0.00 €

List of budget, expenses and revenues of the selected project(s)

Document list

Project Overview		
Document List of May 16, 2017		
Customer and Partner Event 2017 - 2017-0018		
Filename	Status	Note
Budget overview.docx	Strictly confidential	
Meeting minutes.docx		
Letter sponsoring.docx	Authorised	Send per mail

Overview of all documents of a project

Expenses/Revenues

				
John Q. Public Inc.				
Customer and Partner Event 2017		01-12-2017		
Expense (actual, time tracking)				
No.	Position	Unit price	Quantity	Amount
1	Meeting with exhibition hall manager Meeting with exhibition hall manager	40.00 \$	0.00	0.00 \$
2	Meeting with catering service Meeting with catering service	40.00 \$	2.00	80.00 \$
Subtotal				80.00 \$
19% VAT				15.20 \$
Total				95.20 \$

Comparison of expenses and revenues of the selected project(s)

Gantt planning overview (day, month or quarter)

Project Overview		Planning elements of 16.05.2017					
No.	Activity	Start	End	Duration	Progress	Week 2	Week 3
1	Customer and Partner Event 2017	12.01.2017	20.03.2017	47 d	10%	9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24	
2	Kick-off meeting	12.01.2017			100%		
3	PR activities	18.03.2017	20.03.2017	0 d	0%		
4	press releases	18.03.2017	20.03.2017	0 d	0%		
5	catering	11.02.2017	13.03.2017	20 d	0%		
6	additional respite	14.02.2017	21.02.2017	5 d	0%		
7	sign-up deadline	10.02.2017			0%		
8	event marketing customers	19.01.2017	14.03.2017	39 d	0%		
9	first mailing customers	19.01.2017			100%		

Export of the planning overview and the Gantt-chart in different accuracy: varying from very detailed (day) to a rough overview (quarter).

Tip: This template is only recommendable for project-related reports.

Letter


Yourcompany Inc., 99 Yourstreet, Postcode Yourcity Customer and Partner Event 2017 Dear Sir or Madam,

Plain letter regarding the project

Meeting

Meeting Agenda and Notes of May 16, 2017																
Project: (2017-0018) Customer and Partner Event 2017 Status: In Bearbeitung Organizer: Rita Meyer at, from - to: _____ Location: _____ reserved at: _____ Catering: <input type="radio"/> No <input type="radio"/> Yes, namely _____ Attendees: Manager(s): Rita Meyer Manager(s): Carola Moresche Team: Frank Foster Team: John Johnson Team: Patricia Peters Partner(s): Robert Rum																
<table border="1"> <thead> <tr> <th>No.</th> <th>Agenda item</th> <th>Task</th> <th>Responsible</th> <th>Completion date</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Minutes of last meeting</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2</td> <td>Reporter</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	No.	Agenda item	Task	Responsible	Completion date	1	Minutes of last meeting				2	Reporter				
No.	Agenda item	Task	Responsible	Completion date												
1	Minutes of last meeting															
2	Reporter															

Template for the organisation of project meetings

Memo

Memo of May 16, 2017		
From:	Rita Meyer	
Project:	Customer and Partner Event 2017	
Status:	In Bearbeitung	
To:		
Manager(s):	Rita Meyer	
Manager(s):	Carola Moresche	
Team:	Frank Foster	
Team:	John Johnson	
Team:	Patricia Peters	
Partner(s):	Robert Rum	You Name ll, Inc.

A note that includes all basic information of a project.

Planning overview

Project Overview						
Planning Overview of May 16, 2017						
Number	Project	Manager	Start	End		
2017-0018	Customer and Partner Event 2017	Rita Meyer	01-12-2017	04-26-2017		
Activity / Milestone			Start	End	Duration (h)	Progress
Customer and Partner Event 2017			01-12-2017	03-20-2017	383	
Kick-off meeting			01-12-2017	01-12-2017	0	
PR activities			03-18-2017	03-20-2017	7	
press releases			03-18-2017	03-20-2017	7	
catering			02-11-2017	03-13-2017	167	


Overview of the project plan without Gantt-chart

Planning overview Plan/Actual

Project Overview						
Planning Overview Plan/Actual of May 16, 2017						
Number	Project	Manager	Start			
2017-0018	Customer and Partner Event 2017	Rita Meyer	01-12-2017			
Activity / Milestone			Start	End	Duration (h)	Progress
Customer and Partner Event 2017			01-12-2017	03-20-2017	383.00	0
Kick-off meeting			01-12-2017	01-12-2017	0.00	100
PR activities			03-18-2017	03-20-2017	7.00	0
press releases			03-18-2017	03-20-2017	7.00	0
catering			02-11-2017	03-13-2017	167.00	0


Overview of the project plan to compare plan status and actual status of the project

Project completion

	
	<p>Dear all,</p> <p>This is to inform you that the above referenced project has been completed.</p> <p>I would like to thank all the project staff and stakeholders for their good work and present you the relevant project details below.</p>
	<p>Project name und -number: 2017-0018 Customer and Partner Event 2017</p> <p>Manager(s): Rita Meyer</p> <p>Client / Customer:</p> <p>Company / Department:</p>


Final notification to the project

Project kickoff

	
	<p>Dear all,</p> <p>This is to inform you about the official kick off of the above referenced project. Below, please find all relevant project details as of date.</p>
	<p>Project name and number: 2017-0018 Customer and Partner Event 2017</p> <p>Manager(s): Rita Meyer</p> <p>Client / Customer:</p> <p>Company / Department:</p> <p>Project start: 01-12-2017</p> <p>Project end: 04-26-2017 Fixed deadline: Nein</p>

Notification to the project start including all basic information related to the project

Project status

	
	<p>Dear all,</p> <p>This is to inform you about the current status of the above referenced project. Below, please find all relevant project details as of date.</p>
	<p>Project name and number: 2017-0018 Customer and Partner Event 2017</p> <p>Manager: Rita Meyer</p> <p>Client / Customer:</p> <p>Company / Department:</p> <p>Start date: 01-12-2017</p>

Progress report of the current status of the project

Time tracking

Project Overview					
Time tracking of May 16, 2017					
Number	Project	Manager	Start	End	
2017-0018	Customer and Partner Event 2017	Rita Meyer	01-12-2017	04-26-2017	
Time tracking item		Performed by	Start	End	Duration (h)
Meeting with catering service		Kathrin Jungwirth	05-14-2017	05-14-2017	02:00:00
Meeting with exhibition hall manager		Kathrin Jungwirth	05-05-2017	05-05-2017	00:00:00
					Amount: 02:00:00
					Total amount: 02:00:00

Overview of all time tracking entries of a project

How to filter report data

For each report type you can choose, which data you want to include in the report. In addition to real-time filtering in reports, InLoox offers dynamic filtering of the most important project data.

For global reports you can select, which projects you want to include in the report (= Project Filter). Whereas in project-related reports you have already chosen a specific project by opening it.

The following filters can be used for both report types – global reports as well as project-related reports:

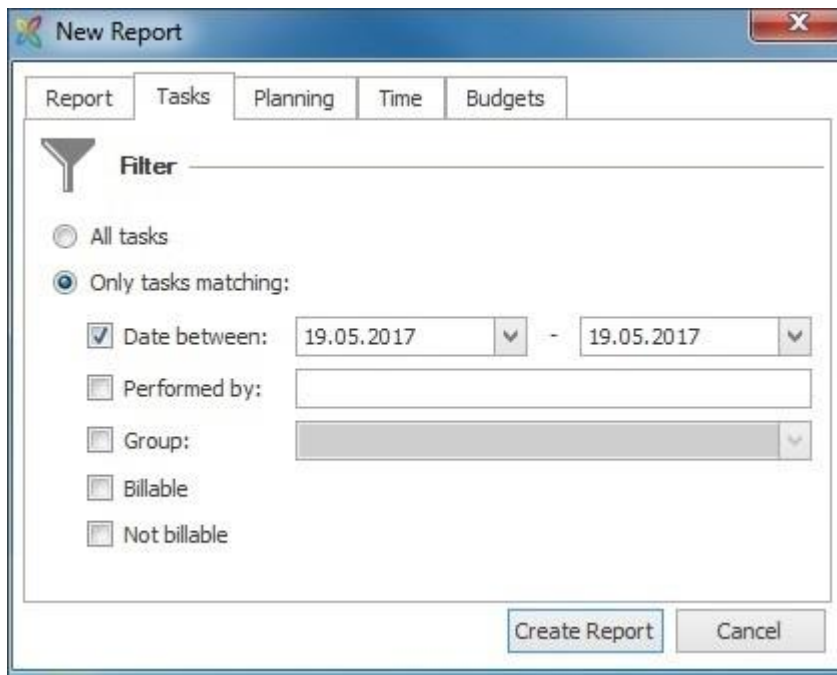
- *Project-related report:* To use one of the following filters, open a project, click on the **Reports** tab, and then on **Create Report**.
- *Global report:* Open the project overview, then open the **Start** tab. There click on **Reports** and **Create Report**.

After both procedures a new window (the report dialog) will open. There you can adjust the filter settings.

Overview of available filters

Task filter

In the report dialog open the **Tasks** tab.



You can include all tasks of the project(s) in you report or select:

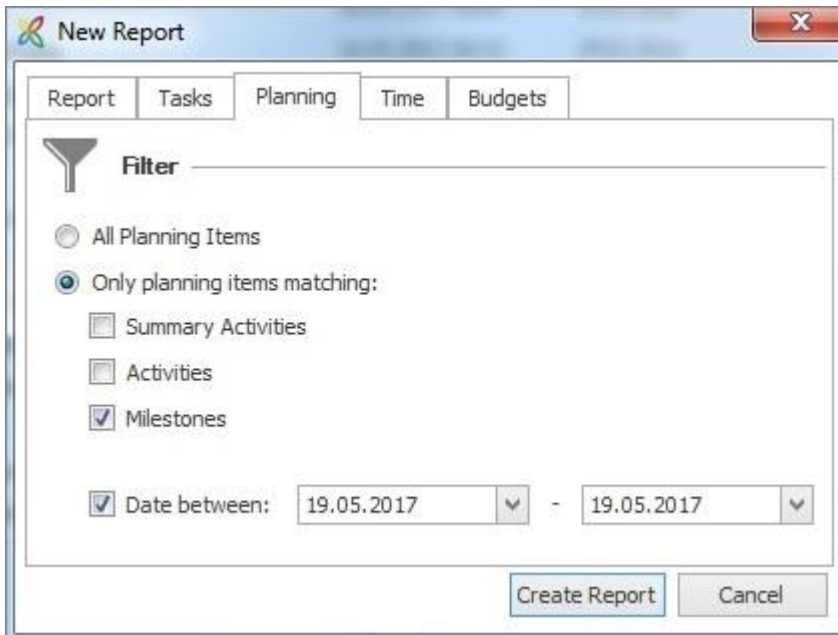
- Tasks matching a specific period of time
- Tasks performed by a specific person
- Tasks from a group
- Tasks, which are billable
- Tasks, which are not billable

Furthermore, you can combine those task filters.

Planning filter

If you want to create a report regarding you project planning, you either include all planning elements (summary activities, activities, milestones) or just selected elements.

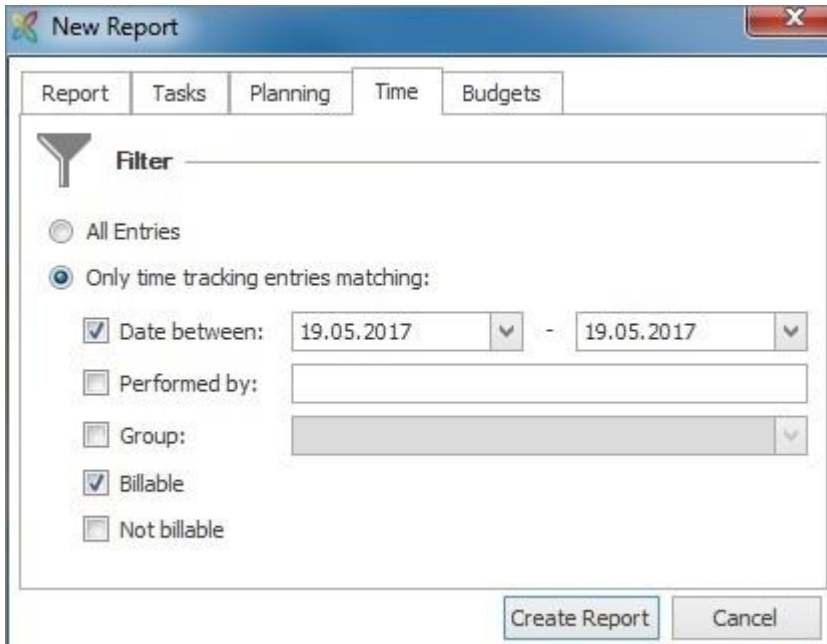
Open the **Planning** tab in the report dialog, to adjust the planning filter:



Additionally you can limit the data by setting a date.

Time filter

If you are including time tracking entries to your report, you can decide whether to use all entries or you can filter them.



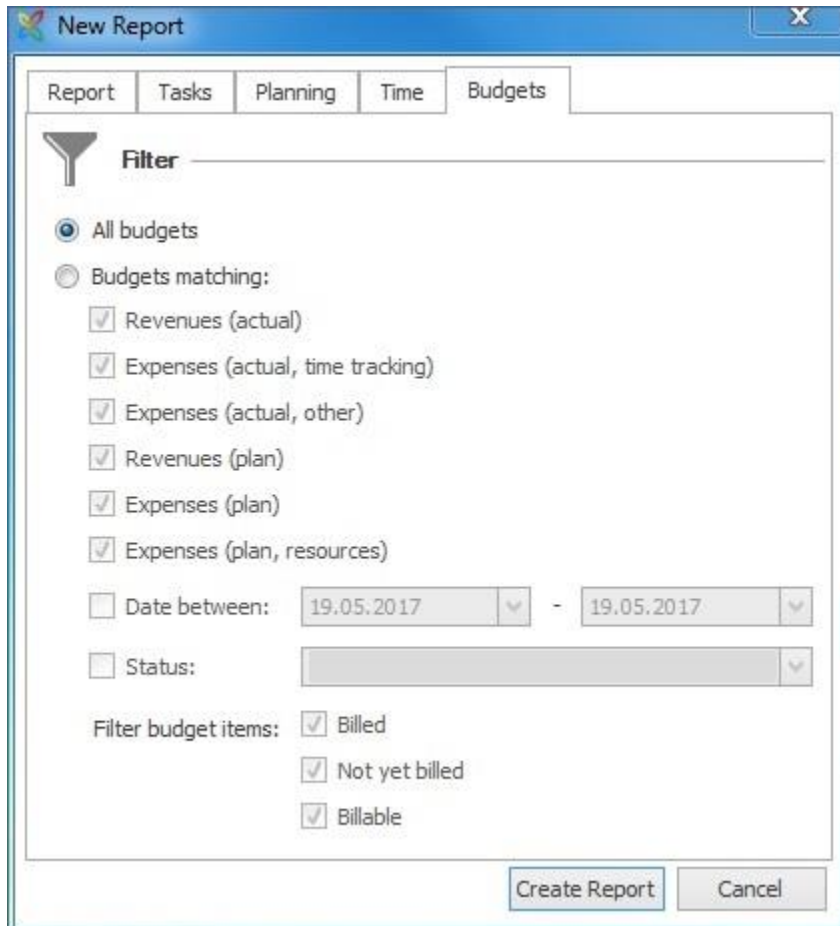
To set the Time filter, open the **Time** tab in the report dialog:

- You can select time tracking entries of a specific period of time.
- You can limit time tracking entries to those of a specific person.
- You can choose entries of a specific group.
- You can choose between billable and not billable time tracking entries.

Furthermore, you can combine those time filters.

Budget filter

For budget-related reports InLoox offers highly selection settings. You can choose either all budgets of the selected project(s) or define one or more budget filters. Therefore, open the **Budgets** tab in the report dialog. The following filter options are available:



You can choose between different budget elements for your report:

- Revenues (actual)
- Expenses (actual, time-tracking)
- Expenses (actual, other than time-tracking)
- Revenues (plan)
- Expenses (plan)
- Expenses (plan, resources)

In addition, InLoox provides you with the following filter options:

- You can select a period of time.
- You can choose a specific project status
- You can filter specific budget items (billed, not yet billed, billable, not billable)

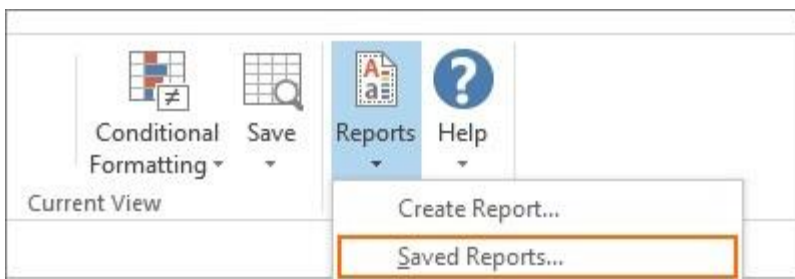
How to save filter settings permanently

If you create reports on a regular base and mainly use the same filter combinations, you do not need to adjust the filter settings each time. You can save those filter settings and reuse them. For saving filter settings permanently you need to be InLoox admin and you should have the permission “Create and edit report templates”.

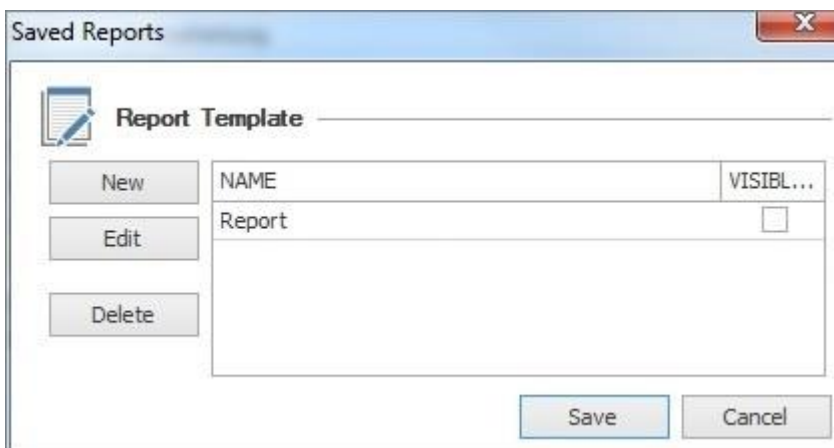
1. Click on **Projects** in the Outlook navigation bar.



2. Afterwards, open the **Start** tab and click on **Reports >> Saved Reports...**



3. A new window will open. There you can see all currently saved reports.



4. You can create a new report template, by clicking on **New**.

5. The report dialog will open. Here you can determine:

- the name of your template.
- to which projects the report is referring to.
- which report template you want to use.
- which project data should be included (filters).
- If you want to give all other InLoox users access to your saved report, you need to tick the checkbox *Visible for all users*.

New Report

Report | Tasks | Planning | Time | Budgets

Report Filter Name

Time tracking (billable)

Visible for all users

Range

All Projects

Selected Projects

Only projects matching:

Number contains:

Name contains:

Customer contains:

Include project requests

Template

Use this template:

Time tracking

Save Report Cancel

6. Click on **Save Report**, to save your settings and to close the window.

7. Now, the saved report appears in the overview:

Saved Reports

Report Template

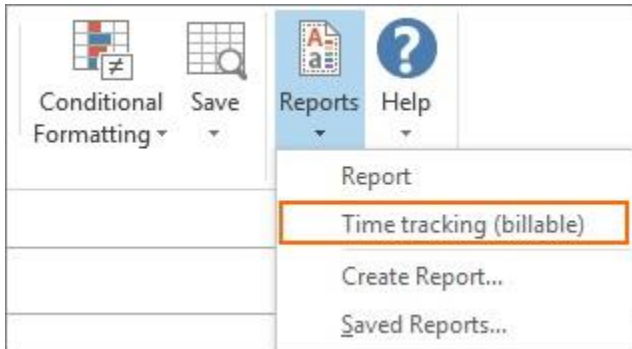
New | Edit | Delete

NAME	VISIBL...
Report	<input type="checkbox"/>
Time tracking (billable)	<input checked="" type="checkbox"/>

Save Cancel

The saved report template is permanently available to you (and all other InLoox users, if you have ticked the checkbox) on the **Start** tab >> **Reports** >> **Saved Reports....** There you also can edit or delete the report template.

To create a new global project-report using this template, click on **Projects** in the Outlook navigation bar. Then click on the **Start** tab and on **Reports**. The new template appears in the drop-down-list and you just have to click on it, to create a new report using that template.

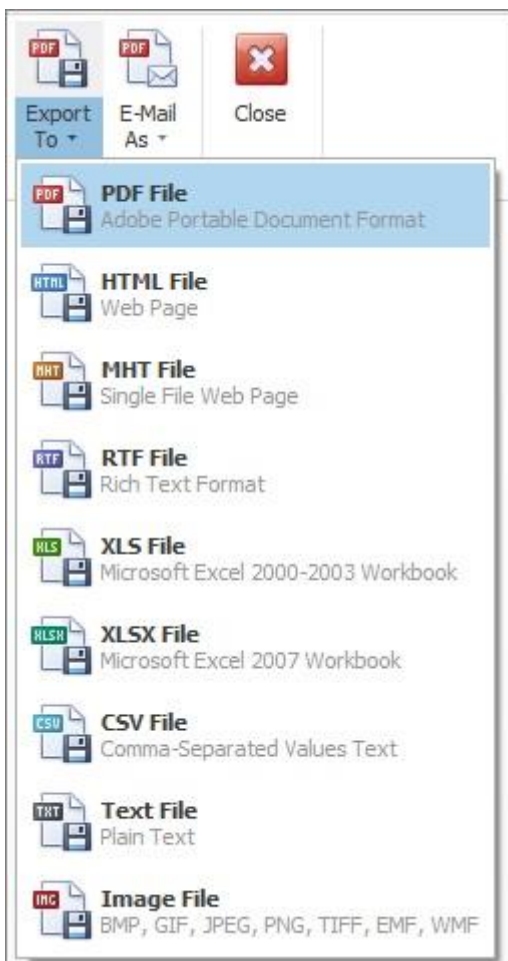


InLoox report designer

Generally, after creating a new report the InLoox report designer will open. The report designer issues your reports and you can adjust the report (e.g. format) there. For exporting the report you can choose between various file types.

Output file types

All InLoox reports can be downloaded in different file types. The following file types are available:



- PFD File (Adobe Portable Document Format)
- HTML File (Web Page)
- MHT File (Single File Web Page)
- RTF File (Rich Text Format)
- Excel File (Microsoft Excel 2000-2003 Workbook)
- Excel 2007-File (Microsoft Excel 2007 Workbook)
- CSV File (Comma-Separated Values Text)
- Text File (Plain Text)
- Image File (BMP, GIF, JPEG, PNG, TIFF, EMF, WMF)

To choose a file type, firstly create a report and filter the report data regarding your needs. Subsequently, click on **Create Report** in the report dialog. A preview window will open. Click on **Export To** in the upper right corner and select the file type.

If you do not want to save the report in a different file type, you can print it via the **Print** button in the upper left corner.

How to manage report templates

1. Note on report security in version 10.2

Starting with version 10.2, script execution in the background is disabled by default. If you want to continue using older InLoox report templates or work with scripts in your own report templates, then you will have to activate the script execution in the background manually in the InLoox options. We do not recommend activation but would like to point out that deactivating the script execution in the background can pose a compatibility risk.

Important Script execution is always disabled in InLoox Web App and InLoox now!.

Scripts allow you to perform automated calculations of certain report elements at certain events. However, script execution can also pose a security risk. In many older report templates there is still program code that is executed when the report is opened or executed, e.g. to calculate values for certain fields such as the sum of all tasks.

InLoox standard reports and newly created reports no longer have any program code. You can now use expressions for calculations instead. Expressions make it possible to create data fields that contain a formula – just like in Excel. For example, you can simply use the expression SUM(Field1) to specify that this field should be totaled for the entire report group.

You can also convert older report templates with data bindings to expressions. This allows you to keep the script execution in the background deactivated, while still being able to use existing report templates.

- For more information on the conversion, see: <https://devexpress.github.io/dotnet-eud/interface-elements-for-desktop/articles/report-designer/report-designer-for-winforms/bind-to-data/data-binding-modes.html>

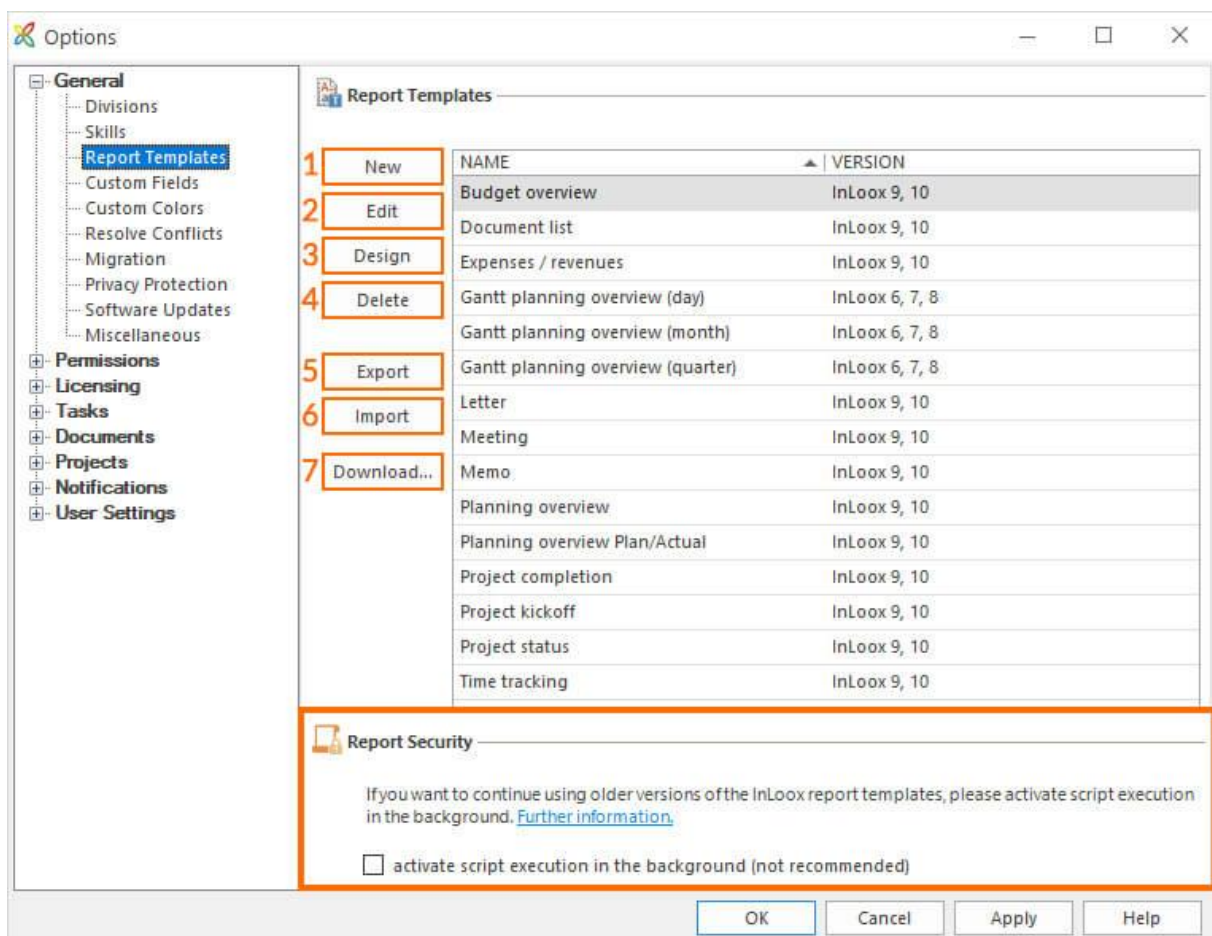
- Detailed information on the use of expressions can be found under the following link: <https://docs.devexpress.com/XtraReports/120091/Detailed-Guide-to-DevExpress-Reporting/Use-Expressions>

2. Manage report templates

Attention To administrate report templates you should be InLoox admin or you will need the permission “[Create and edit report templates](#)”. For more information on user permissions see also “[Set user permissions](#)”.

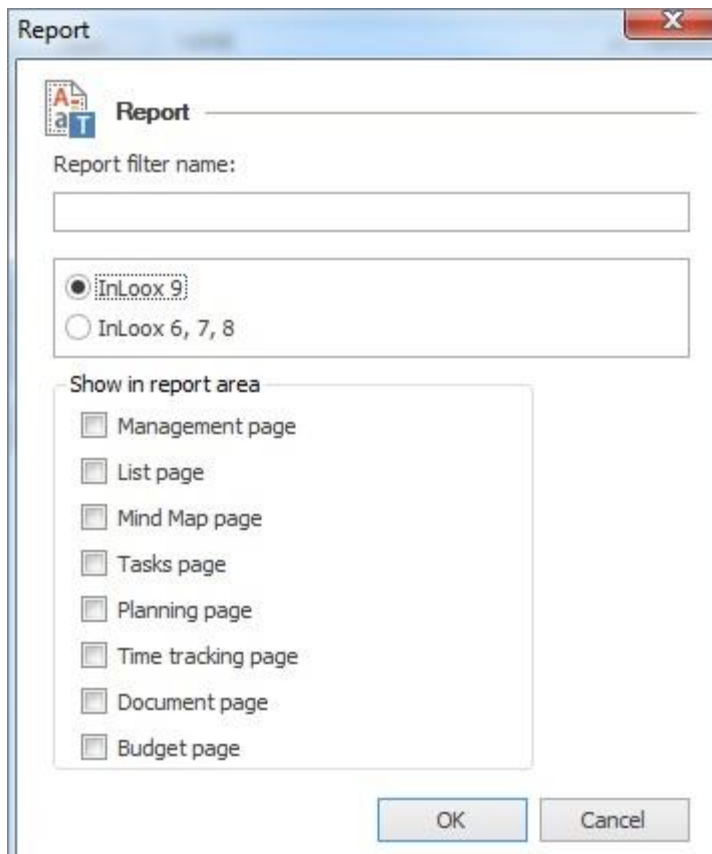
Generally, report templates can be managed in the InLoox options:

1. Open Outlook and click on **Home** in the upper left corner. Select **InLoox Options** from the list.
2. A new window will open. Select **General >> Report Templates** on the left side of the window. An overview of the report templates will be shown.



3. Create a new report template

1. To create a new report template, open the InLoox options and click on **General >> Report Templates**.
2. Click on **New** and another window is going to open.



3. In this window you can define all important aspects of the new report:

- Name the report.
- Choose between **Inloox 9, 10** and older InLoox versions. InLoox 9, 10 provides you with a new version of the report designer. You can still create and edit reports from **InLoox 6, 7, 8** but this is going to change in future InLoox versions.
- Define from which areas of a project you want to have access to this report template.

4. Afterwards click on **OK** to close the window and to save your settings.

5. Now the report designer is going to open. There you can design the new template individually. For more information on how to use the report designer, see [InLoox Report Designer](#). When you have finished, click on **Apply** in the InLoox options, to save your changes.

4. Edit report templates

If you want to change the general settings of a template (like name or visibility), select the template in the overview and click on **Edit**. A new window is going to open. There you can edit all important settings:

- You can change the name of the template.
- Choose between **Inloox 9, 10** and older InLoox versions. InLoox 9, 10 provides you with a new version of the report designer. You can still create and edit reports from **InLoox 6, 7, 8** but this is going to change in future InLoox versions.
- Define from which areas of a project you want to have access to this report template.

When you have finished, click on **OK** and the window is going to close. Back to the InLoox options click on **Apply** to save your changes.

5. Design report templates

To change the content of an already existing report template, select the template in the overview and click on **Design**. The InLoox report designer is going to open. For more information on how to use the report designer, see [InLoox Report Designer](#). When you have finished, click on **Apply** in the InLoox options, to save your changes.

6. Delete report templates

To delete a report template, select the template in the overview and click on **Delete**.

7. Export report templates

To save a report template on your computer, select the template in the overview and click on **Export**. Afterwards, you can choose the storage location and then click on **Save**. When you have finished, click on **Apply** in the InLoox options, to save your changes.

8. Import report templates

To import a report templates which is saved on your computer, click on **Import** and select the template from your computer. Afterwards, click on **Open**. When you have finished, click on **Apply** in the InLoox options, to save your changes.

9. Download report templates

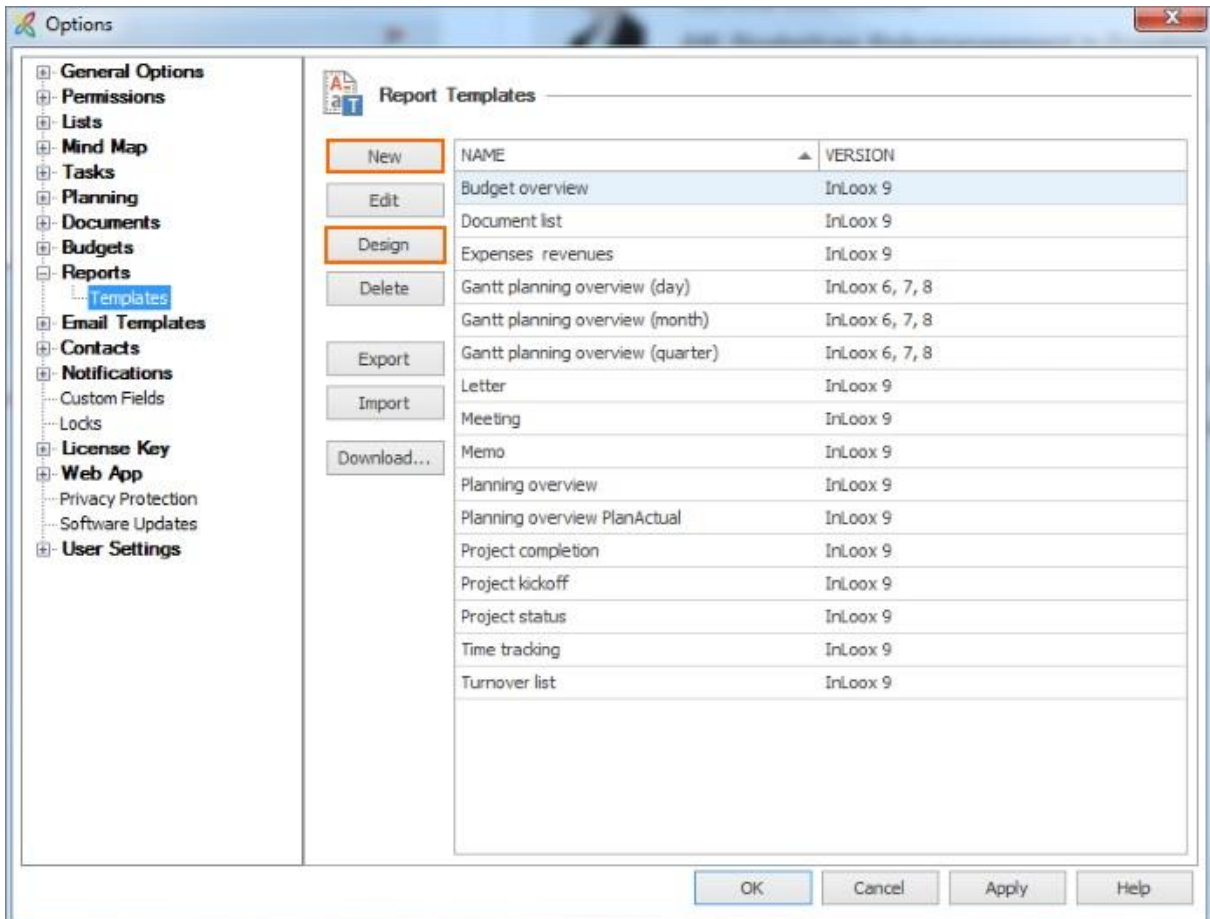
On the InLoox website you can download several standard report templates:

1. Click on **Download** in the InLoox options and the InLoox website is going to open.
2. There click on **Templates** and select the English version of the report templates.
3. A zip-file will be downloaded and saved on your computer in the download folder.
4. Open this folder by using the windows explorer and double-click on the zip-file to open it. Copy the templates and save them to another place on your computer.
5. Return to the **InLoox options >> Reports >> Templates** and click on **Import**.
6. Select one of the saved templates from your computer and click on **Save**.
7. Proceed like this for all other templates.
8. When you have finished, click on **Apply** in the InLoox options, to save your changes.

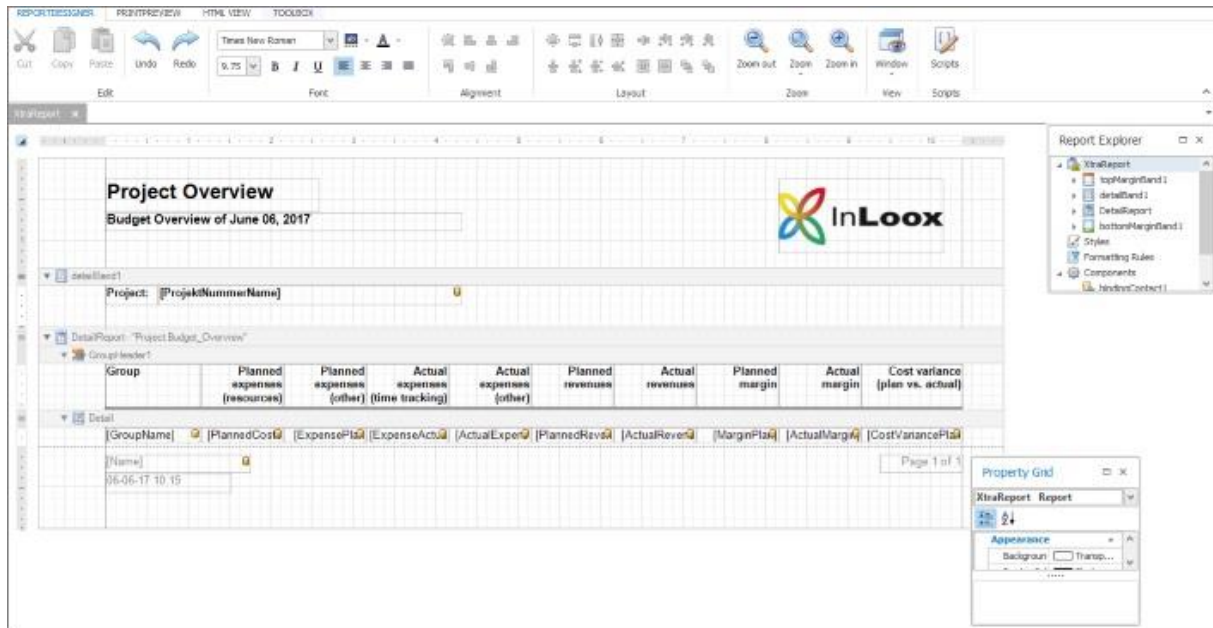
InLoox Report Designer

By using the InLoox report designer you can create individual report templates on your own. This chapter shortly introduces the main features of the report designer. However, it is not possible to explain everything in detail due to the immense range of features.

You can access the InLoox report designer via the InLoox options (**Home >> InLoox options >> Reports >> Templates**):



By clicking on **New** you can create a new report. By clicking on **Design** or double-clicking on an already existing report you can edit the report templates. In both cases the InLoox report designer is going to open.

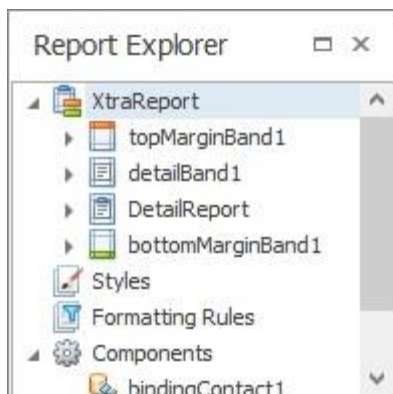


Using the report designer you can individually create report templates. Using the report designer you determine font type, font size, positions and data.

In the following some elements and features of the report designer are introduced:

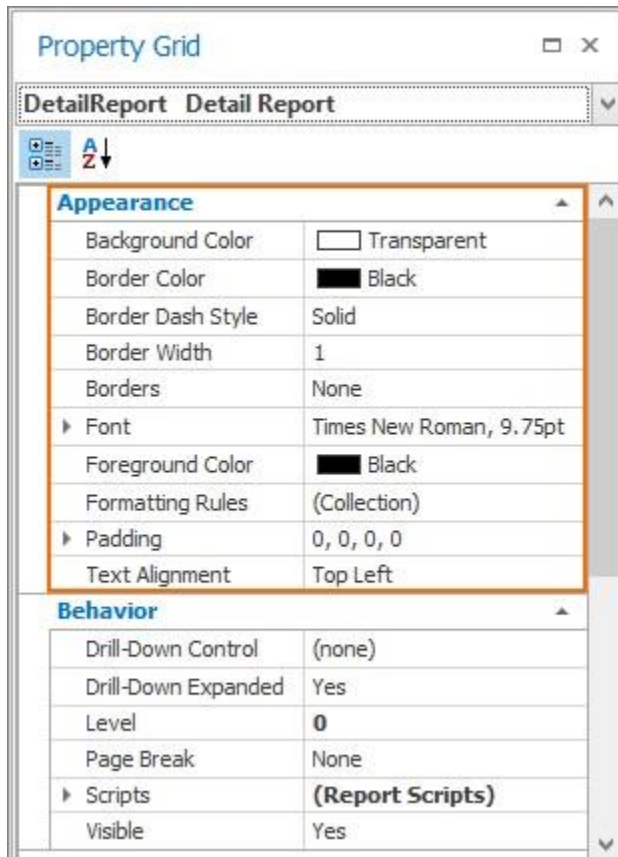
1 Report Explorer

The report explorer shows the structure (margins) of a report. To open the report explorer, click on **Windows** in the **ReportDesigner** tab and select **Report Explorer** from the drop-down-list.



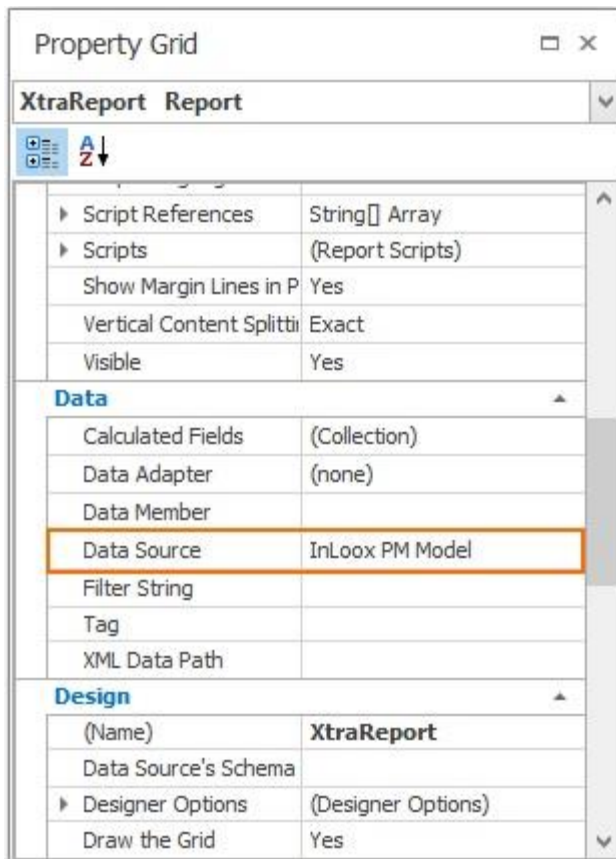
2 Default Layout

In the property grid you can determine the default layout for the template. To open the property grid, click on **Windows** in the **ReportDesigner** tab and select **Property Grid** from the drop-down-list.



3 Data Source

The data source for the report can be determined in the property grid, too. To open the property grid, click on **Windows** in the **ReportDesigner** tab and select **Property Grid** from the drop-down-list. In the property grid scroll down to **Data**.



4 Zoom and Layout Features

Zoom features are especially helpful to receive an overview to large reports. The zoom features are located in the **ReportDesigner** tab.



You can switch between three different views: ReportDesigner, PrintReview and HTML View. You can access those views via the different tabs.

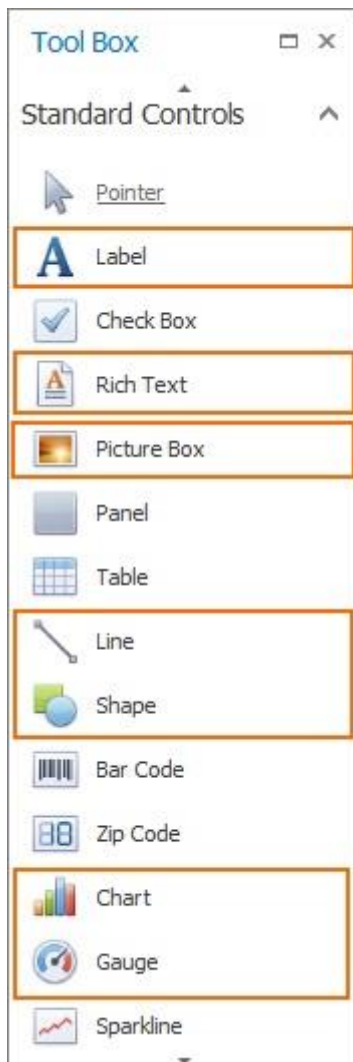


5 Most important tools

To open the tool overview click on **Windows** in the **ReportDesigner** tab and select **Tool Box** from the drop-down-list.

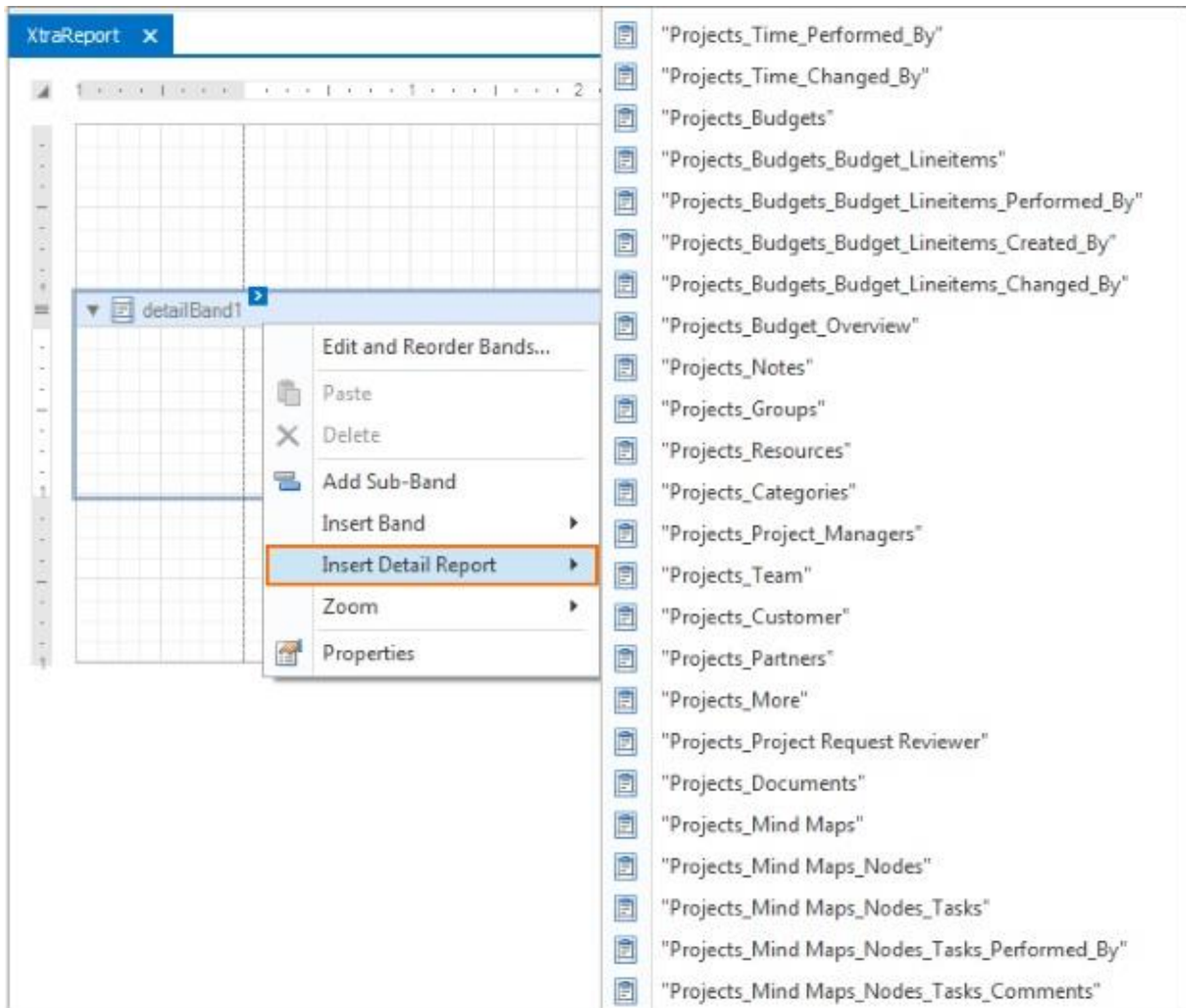
The report designer provides various tools. The most important ones are:

- Label: e.g. for headlines, the company name or simple formatting
- Rich Text: for InLoox description windows
- Picture Box: for the logo
- Line & Shape: for simple drawings
- Chart & Gauge: for bar and pie charts

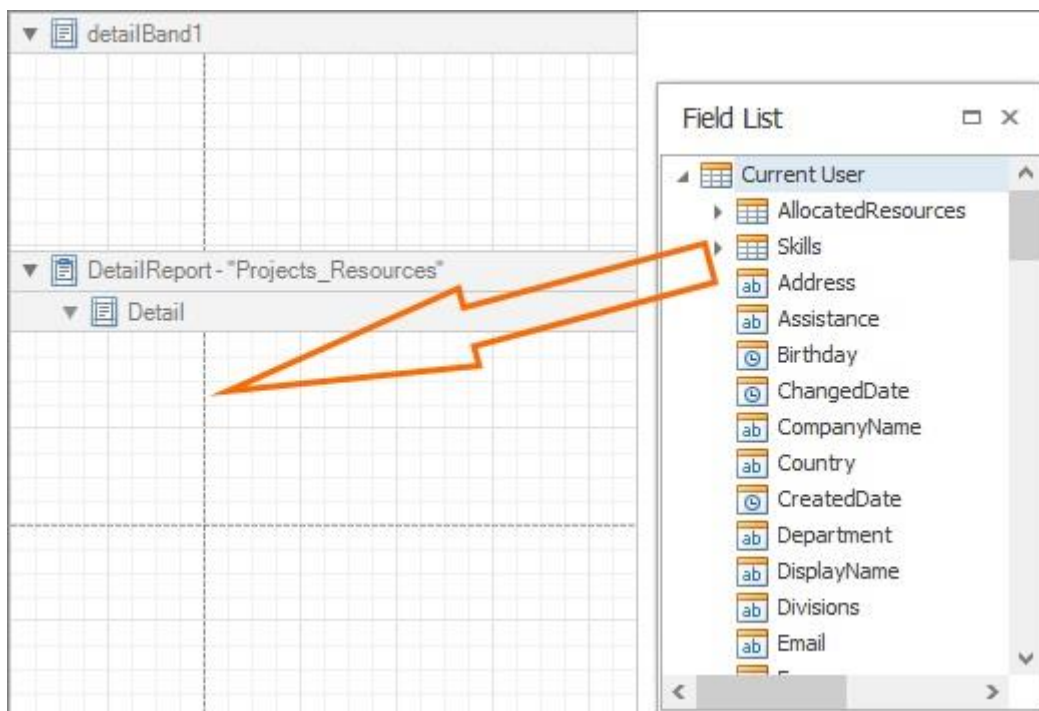


6 Detail Reports

You can select detail reports regarding specific project areas in the report. Therefore, right-click on the detail band in the report and select **Insert Detail Report** in the context menu. Now you can select a project area to create a report on it.



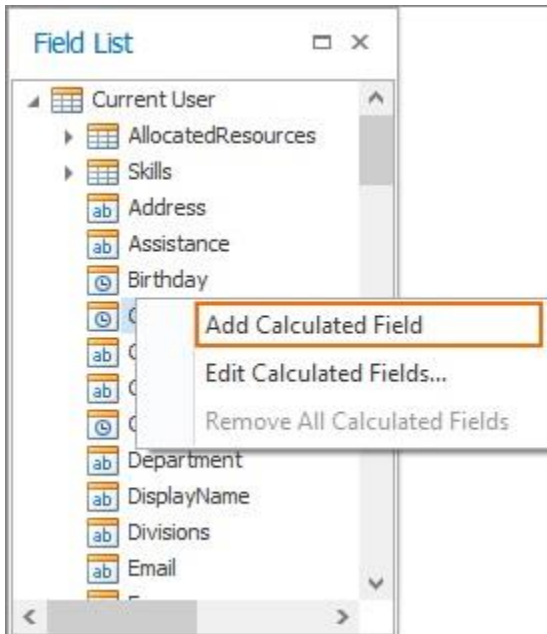
To edit the detail report, open the window **Field List** via **ReportDesigner >> Windows >> Field List**. Drag-and-Drop all fields you will need into the detail report.



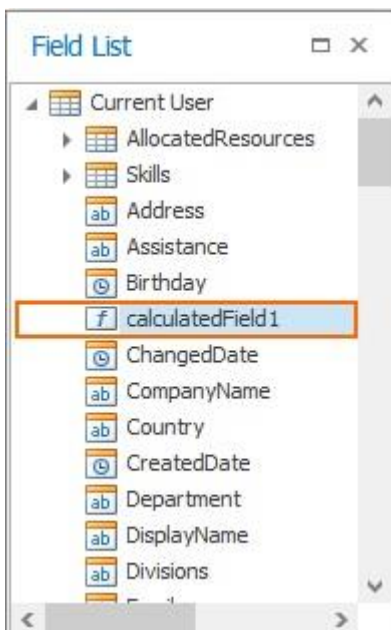
7 Add Calculated Fields

In addition to all available fields in the field list, you can use calculations, filters, transformations (e.g. from text to number) and conditions. Those features are available by using calculated fields. To create a new calculated field proceed as follows:

1. Open the field list via **ReportDesigner >> Windows >> Field List**.
2. Right-click in the window field list and select **Add Calculated Fields** in the context menu.



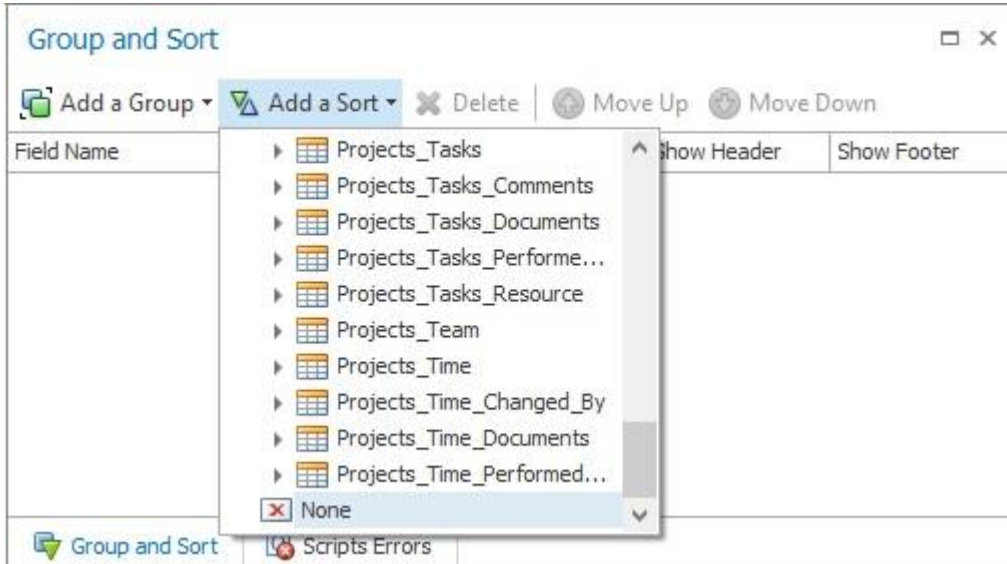
3. A new calculated field will appear in the field list.



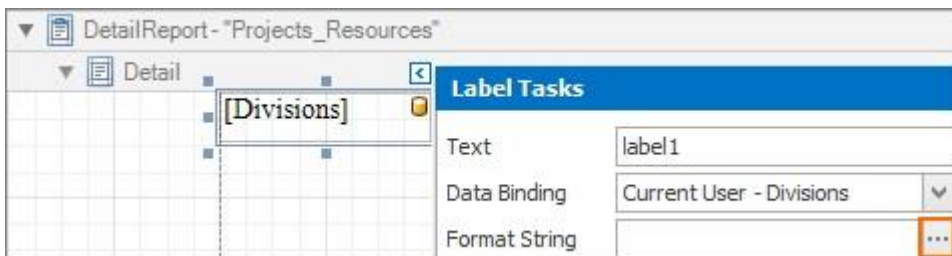
4. Right-click on the calculated field and select **Edit Expression**. A new window is going to open. There you can edit the calculated field using for example if/else constructs.

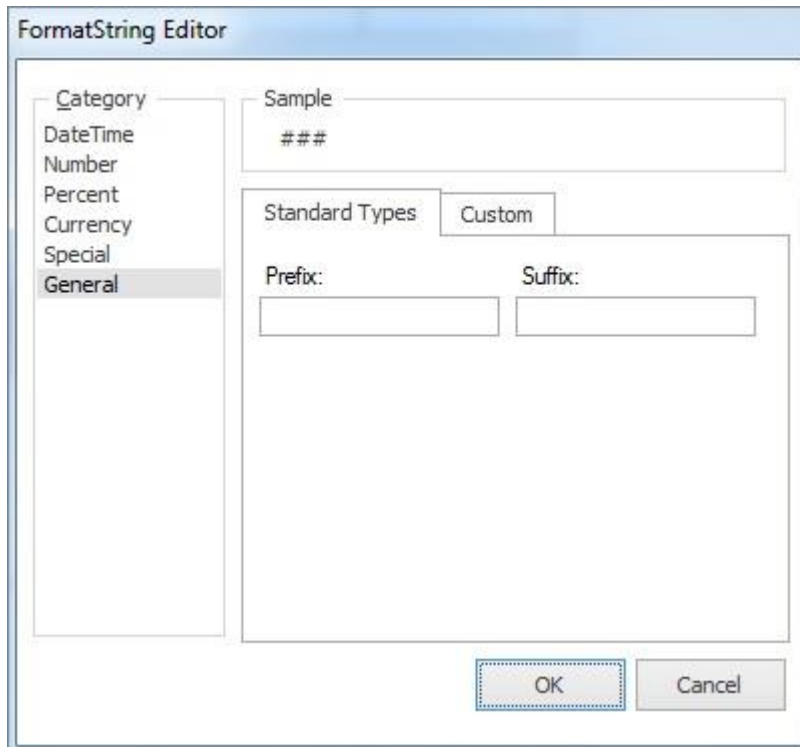
8 Sort and Formatting

Sort: The report data can be sorted in respect to every field. To sort the report proceed as follows: **ReportDesigner >> Windows >> Group and Sort**



Formatting: Additionally, you can format data fields and the related formatting rules. To edit the formatting, click on the blue arrow right above the specific field and select **Format String**. The **FormatString Editor** is going to open. There you can edit the formatting rules.





Resources and Allocation

Resources can be people, but also objects such as rooms, machines or financial assets. It is important to have the right resource working on a task or project for its efficient and successful completion. InLoox enables you to manage the capacities of staff, rooms or machines, as well as allocate tasks according to the resources' capacities. The result is a more effective use of resources, which leads to an increase of your projects' efficiency.

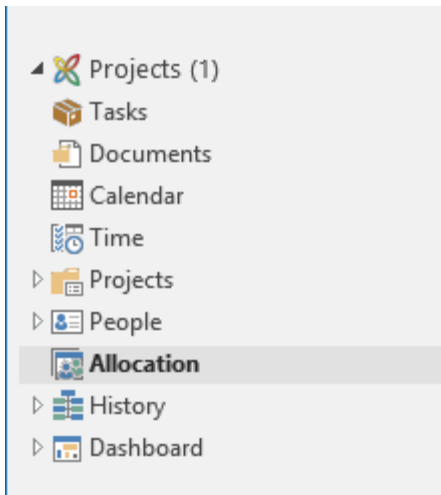
[Open the resources and workload allocation overview](#)

Open system wide resources and allocation overview

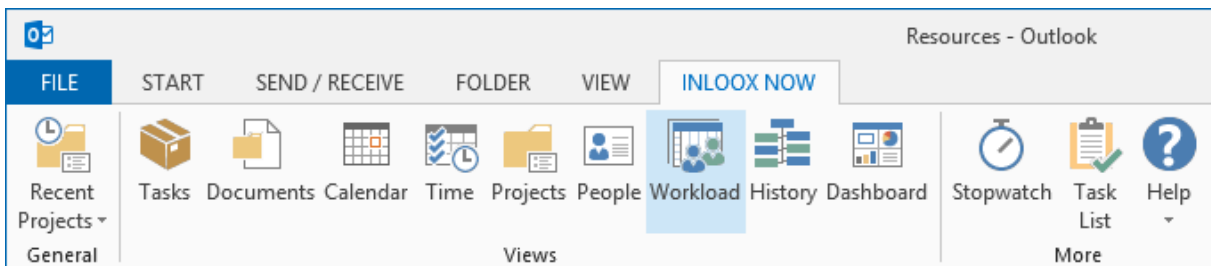
Follow these steps to open the system wide, project-independent resources and allocation overview:

Open Outlook and navigate to InLoox by clicking on **Projects** in the navigation bar and then select **Allocation** in the folder panel.

Projects Mail Calendar People ...



You can also open the allocation overview by clicking on the **InLoox** tab in Outlook and then selecting **Workload** in the ribbon.

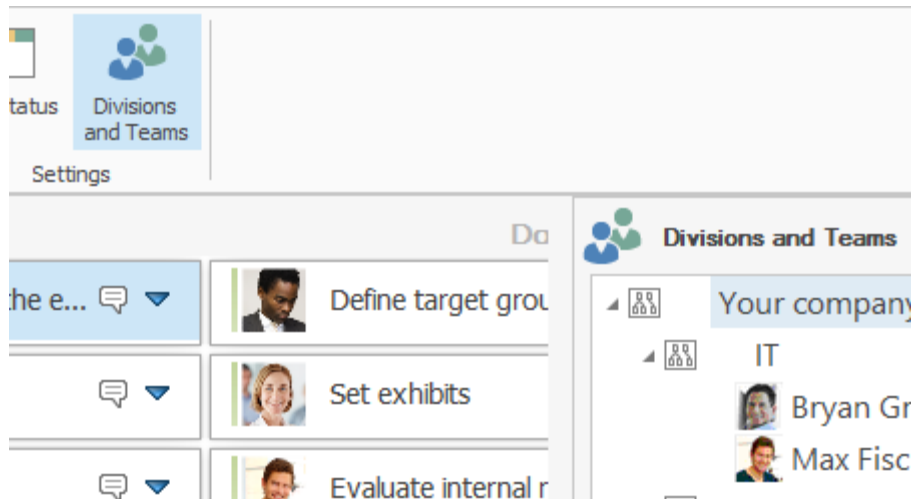


Open resources and allocation overview inside a project

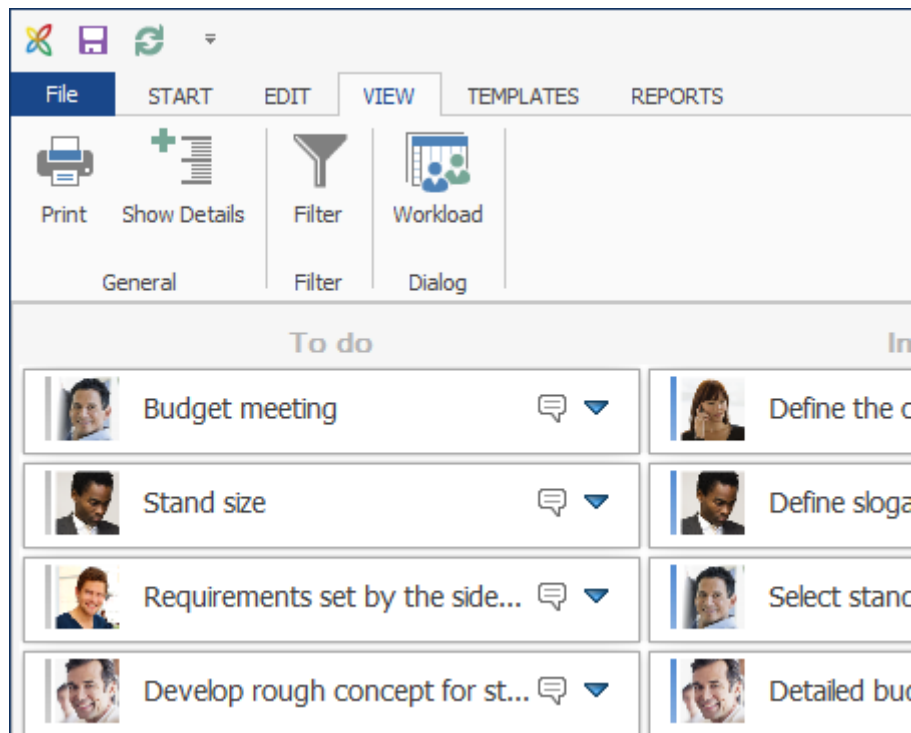
You can also find the resources and allocation overview inside individual projects. There you can display and manage the workload of the project team. You can display the workload overview in the **Kanban view** as well as the **planning**.

Open workload in the Kanban view:

1. Navigate to your projects **InLoox >> Projects** and open a project from the project list.
2. Click on **Tasks** in the **Start** tab of the InLoox project window.
3. To show the departments and teams side panel, click on **Divisions and Teams** in the **Edit** tab.



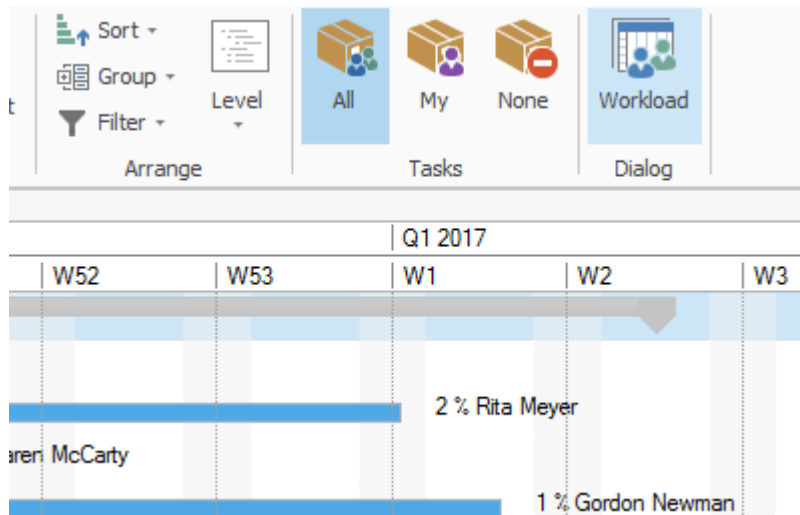
4. To open the workload overview of your project team, go to the **View** tab and click on **Workload**. The workload overview opens in a new window.



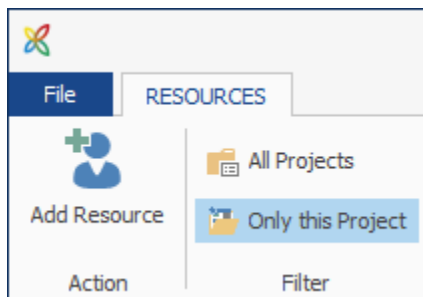
Open workload in the Planning:

Tip You can change the color scheme of the workload view in the planning in the **InLoox Options**.

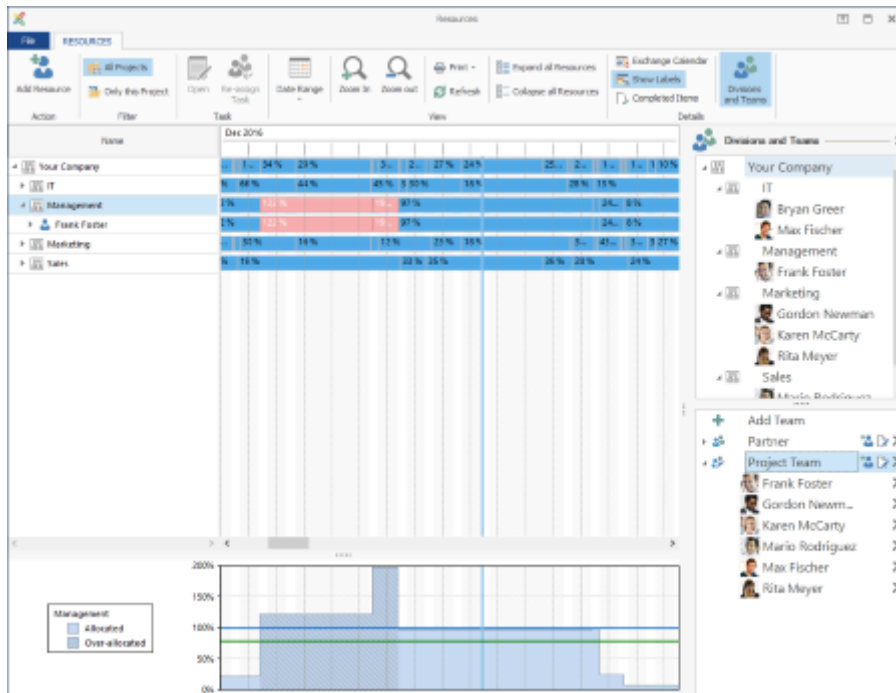
1. Go to your projects **InLoox >> Projects** and open a project in your project list
2. Click on **Planning** in the **Start** tab of the InLoox window
3. Click on **Workload** in the ribbon to open your workload overview



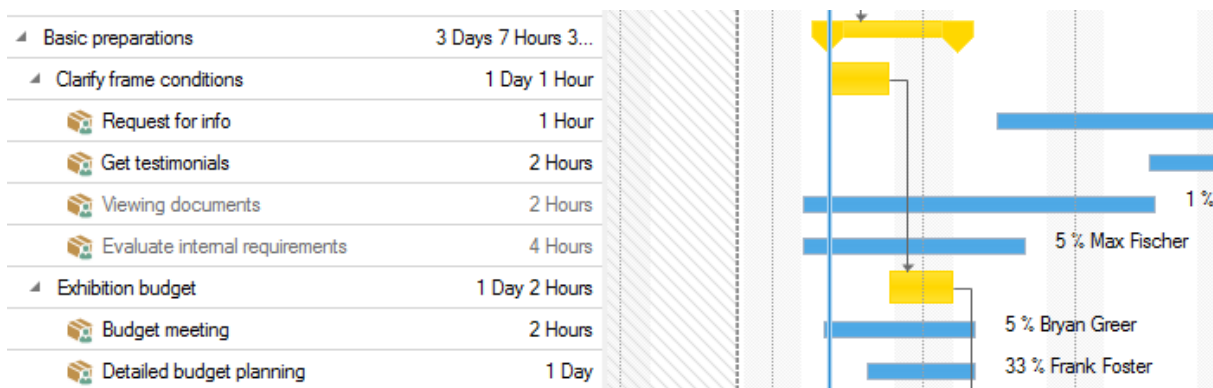
4. You can display the workload in all projects (**All Projects**) or only the workload of the project that is currently open (**Only this Project**).



5. To display the workload, drag-and-drop one or more divisions and teams into the resource overview. If you want to hide the workload of a specific group, just drag-and-drop the group back into the side panel.

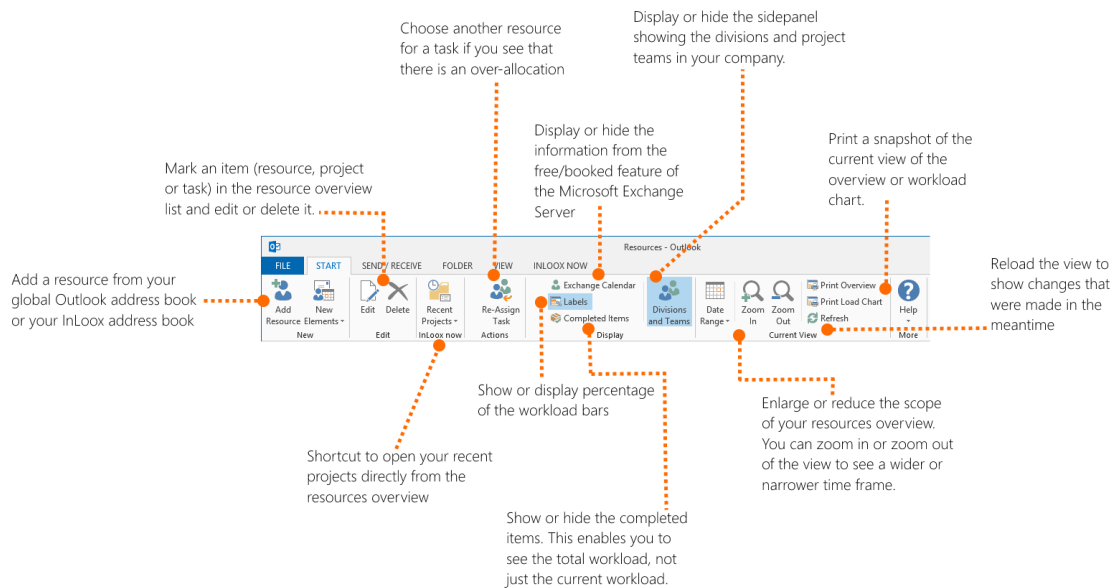


You can also see the capacity of resources next to each task in the planning, provided you have allocated a resource to the task. This enables you to see who in the project team still has capacities and who is over-allocated. In the latter cases, it is advisable to re-assign tasks to relieve a resource.

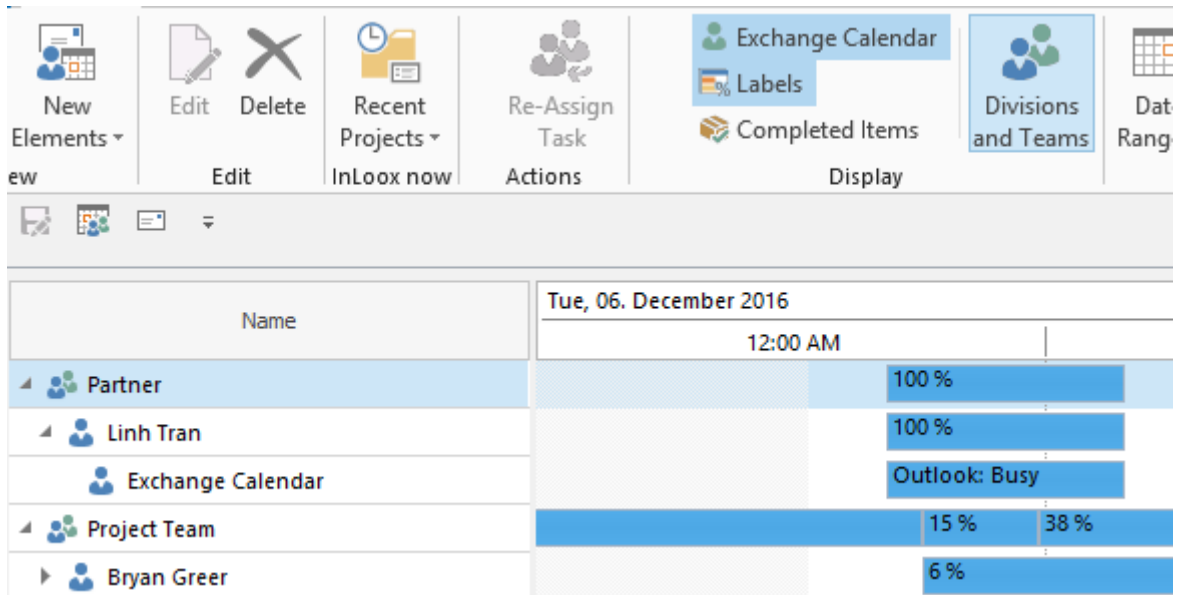


Tip Project teams should never work to capacity (100%), because in most cases they do not work exclusively on the project. Usually, they also have to handle their daily workload. This means that when they are working to capacity in a project, they are actually over-allocated because you have to add 20% or 40% workload for daily tasks to the 100% project workload.

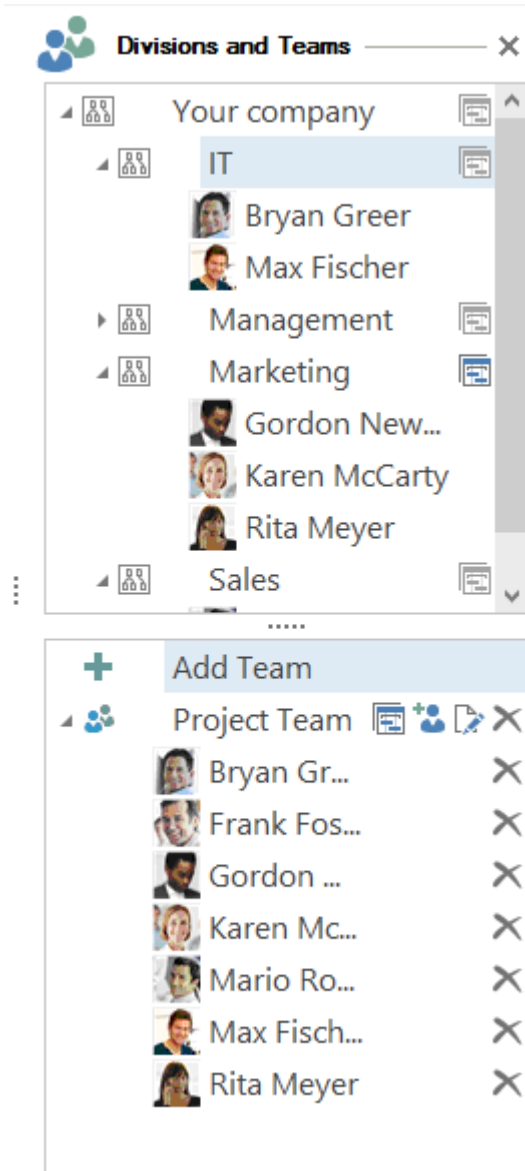
Selected allocation features



- **Add Resource** – Add a new resource, e.g. from the global address book or the InLoox address book.
- **Edit and Delete** – You can edit or delete elements (resources, tasks, but NOT projects) in the resource overview.
Please note Deleting a task in the allocation overview also deletes the task in the project.
- **Recent Projects** - Access your most recently opened projects directly from the workload overview.
- **Re-Assign Task** – If you see that a resource is over-allocated, you can relieve them by re-assigning the task to someone in the team who still has free capacities.
- **Exchange Calendar** – You can show or hide the Free/Booked information from the Exchange Server. InLoox takes the Exchange calendar information into account when it calculates the workload.
Please note The Free/Booked information is only available for internal resources, and only when you are online. The information is never available for external resources, neither online nor offline.

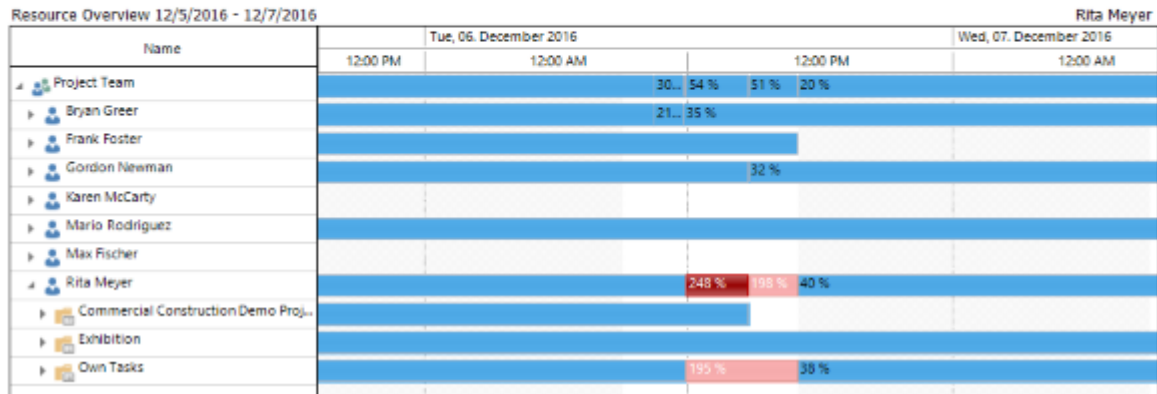
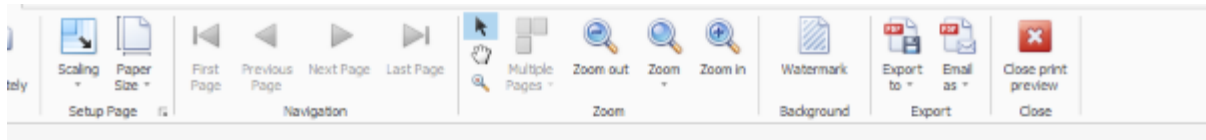


- **Labels** – You can decide whether you want to show or hide the percentage of the workload next to the bars in the overview.
- **Completed Items** – You can show or hide tasks that have been marked as “Done”. By showing the completed tasks you will get an overview of the complete workload. If you just want to see the current and future workload, then hide the completed items.
- **Divisions and Teams** – You can show or hide the Divisions and Teams side panel. The side panel displays all departments in your organizations and the resources who work in the individual departments. You can also create individual cross-department project teams.



Please note It is not possible to create new departments (Divisions) in the workload overview. You can create, edit and delete departments in the InLoox options, if you have the necessary administrator rights. You can also allocate resources to departments.

- **Date Range, Zoom In and Zoom Out** – Decide for which time range you want to see the workload (hours, days, weeks, months, quarters, years). The view of the resources and workload chart changes depending on the date range.
- **Print Overview and Load Chart** – Print the current view of the resources overview or the workload chart.

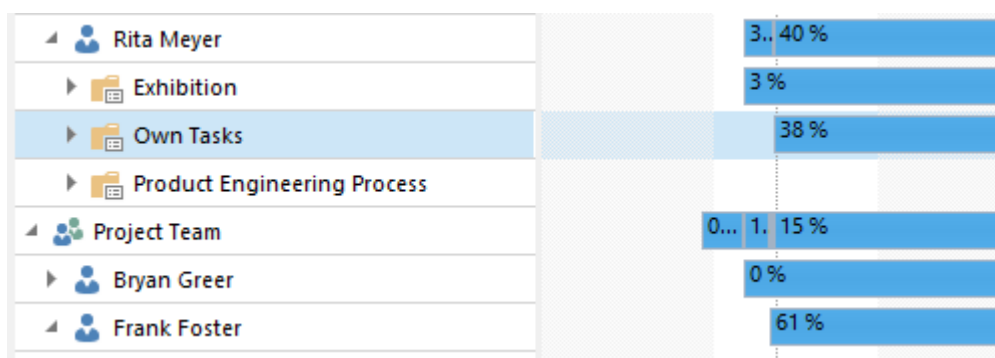


- **Refresh** – Click on refresh to apply all changes and to update the view.

Show the workload in the resource overview

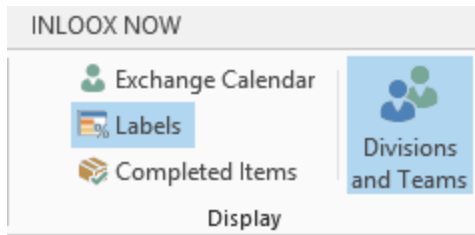
Please note The workload overview only shows the workload and allocation of tasks that have a start and end date.

The resource overview shows you a visual overview of the workload allocation during the specified date range. You can decide which resource's workloads you want to see in the resources and workload allocation overview. The overview also shows, in addition to the project tasks, the Free/Booked information from the Exchange Server, if the option is selected. Your own, project-independent tasks are also displayed in the workload overview.





Follow these steps to show the workload in the resources and workload overview:

1. Go to Allocation: **InLoox >> Allocation**
2. Display the side panel, if it isn't open already, by clicking on **Divisions and Teams** in the ribbon.

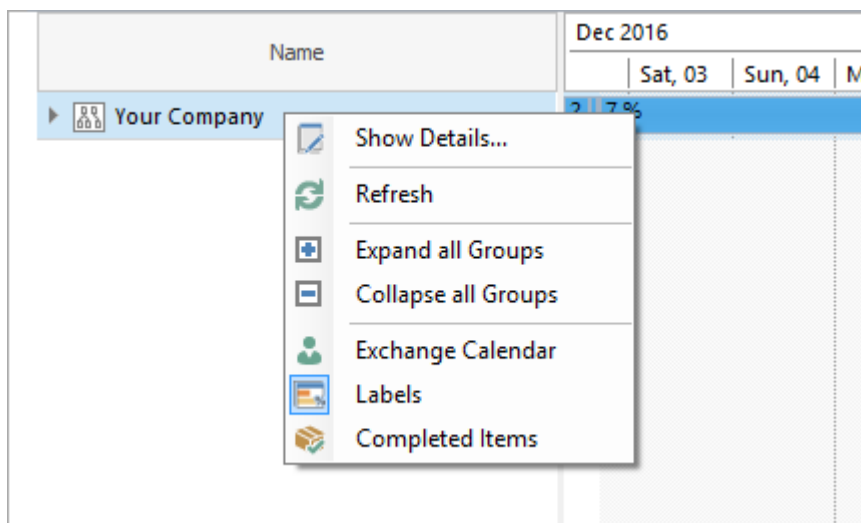


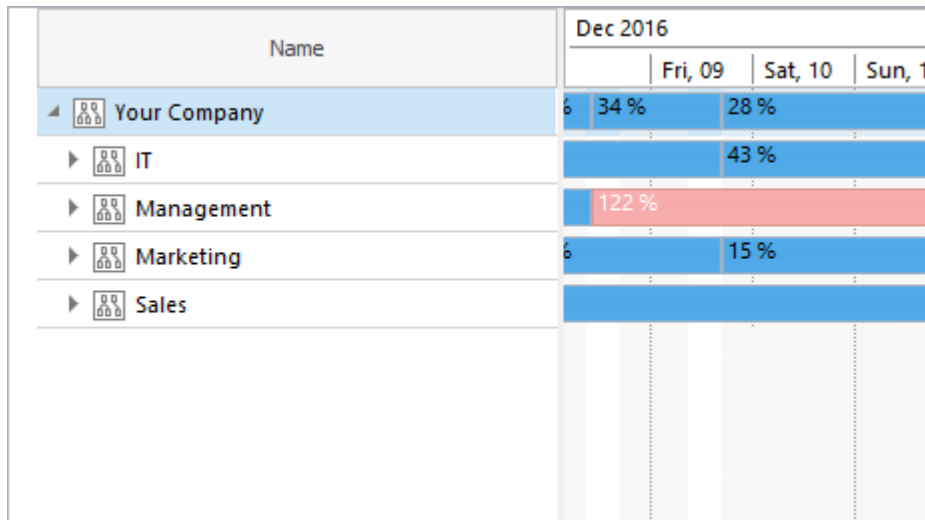
3. Select a group from the **Divisions and Teams** side panel for which you want to show the allocation.

To do so click on the **Display** icon  next to the respective groups or you can also drag-and-drop the group into the list on the left. For example, drag the group *Your Company* into the list to show the workload allocation of your entire company.

Name	Dec 2016		
	Sat, 03	Sun, 04	M
▶  Your Company	2.	7 %	

4. If you want to see how the workload is divided between the departments within your company, you can open the subordinate groups by expanding the group *My Company*. To do so just click on the arrow next to the group you want to expand, or expand the group by opening the context menu with a right click and expand it with **Expand All Groups**.

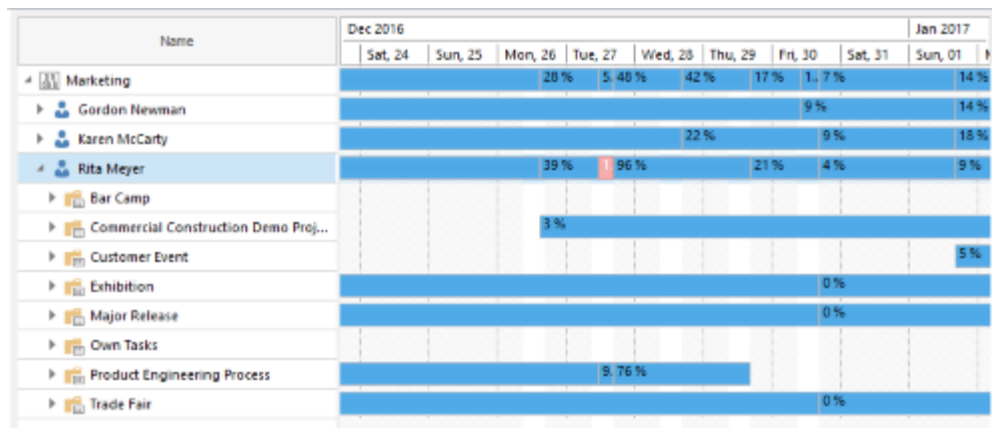




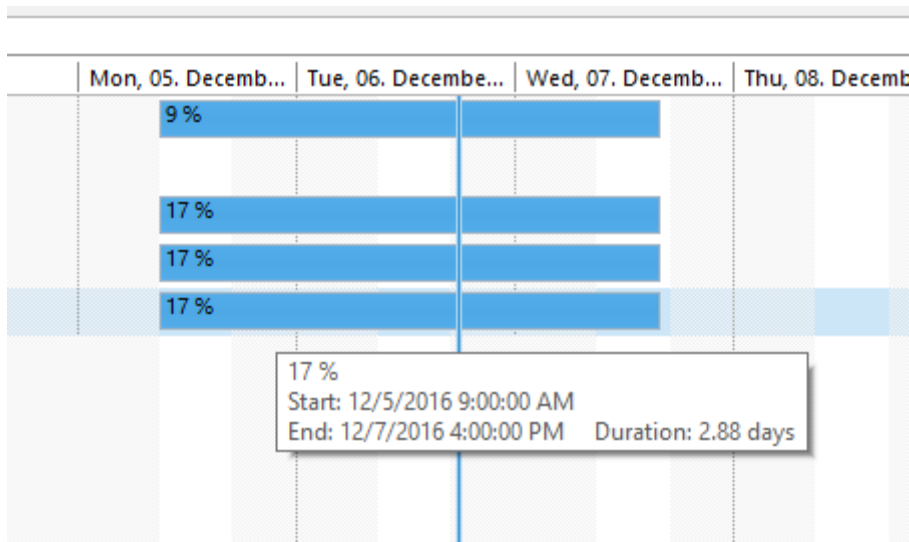
You can see that in the above example, the company as a whole isn't over-allocated, but the department *Management* is over-allocated. It is also possible that it is not the whole department that is over-allocated, but only one of the resources is. In such cases it is advisable that you re-assign the tasks to relieve the over-allocated resource.

Work with the resource overview

The resources overview chart shows you the workload of your resources and whether they still have capacities or are over-allocated. It is possible to show or hide the workload all or selected departments. This enables you to get an overview of the workload of your whole organization, or just the workload of one or more departments or project teams.

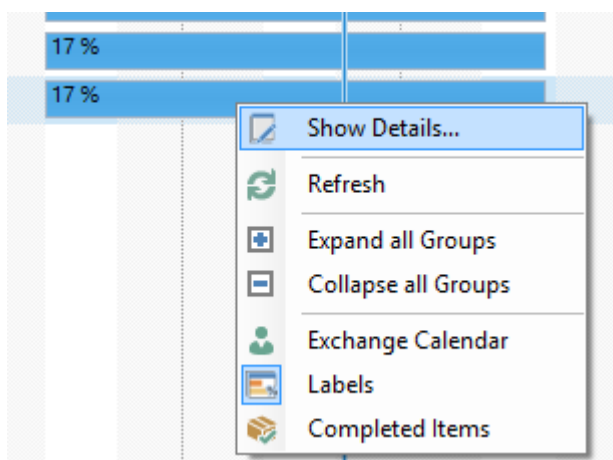


- The bars show the extent and duration of the allocation:
 - **Blue** bar: 1% - 100%
 - **Pink** bar: 101% - 149%
 - **Red** bar: > 149%
- A blue vertical line marks the **current date**
- If you hover over a bar, you can see the **details** of the allocation:



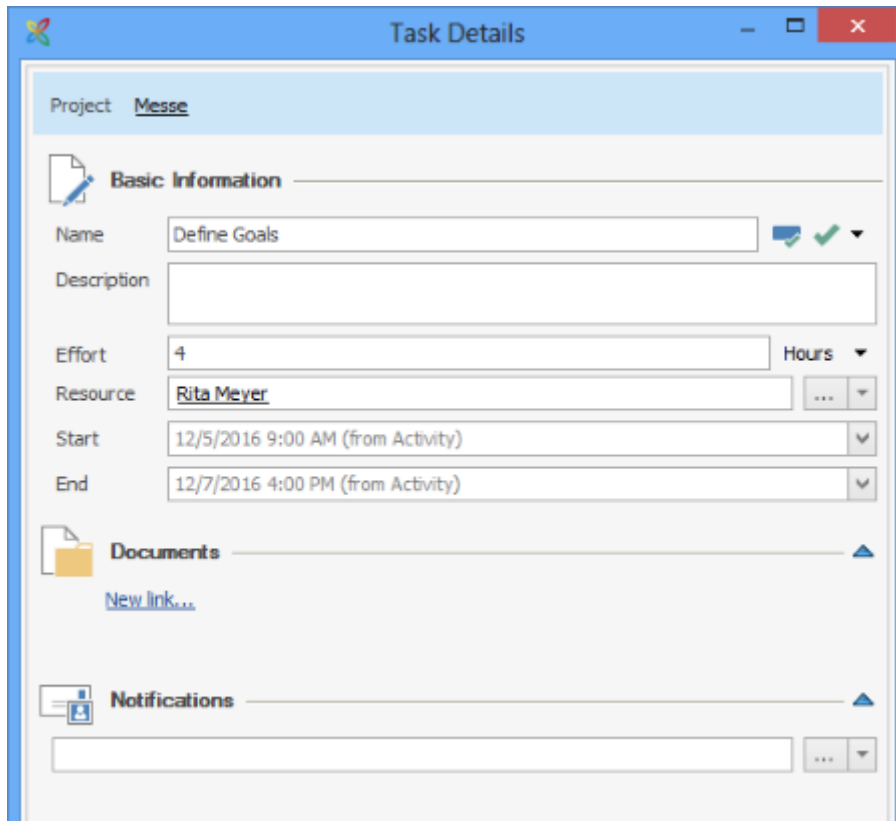
- The **percentage** shows you the extent of the allocation. Over 100% means that your resource is over-allocated.
- The **start and end date and the duration** of the allocation
- You can also edit the respective resources, projects or tasks directly in the workload overview:

1. Open the respective detail window by double-clicking on an element. Or open the context menu with a right-click on an element in the resource list on the left hand side. Click on **Show Details**



2. Depending on the type of the element you have marked, a different edit window opens:

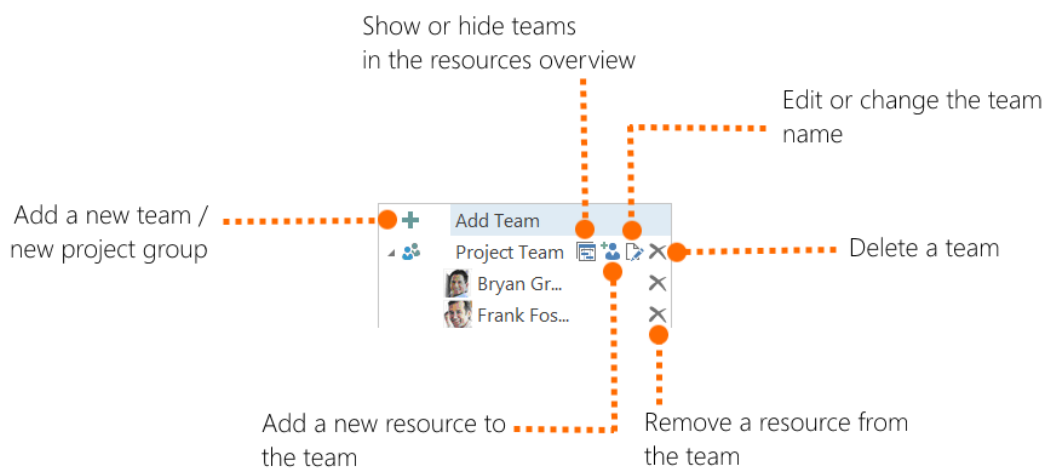
- For **resources**, the contact window opens where you can edit the contact details
- For **projects**, the project window opens where you can change the project data, or go to the Kanban view or the Planning etc.
- For **tasks**, the task window opens where you can edit the task and add task notes



Add a new team


Please note The teams you create in the resources and allocation overview are only visible to yourself. Other InLoox users in your system cannot see the changes. So editing or deleting a team member has no effect on the resources and workload view of other InLoox users.

You can create individual teams to see the workload of cross-department project teams.





1. Open the **Divisions and Teams** side panel and click **Add Team**.

2. Click on the **Edit** button  and enter the name of the team.

3. Add team members by clicking on the **Add Resource** icon .

Tip If a team member works on several projects, then you can just copy that member per drag-and-drop.

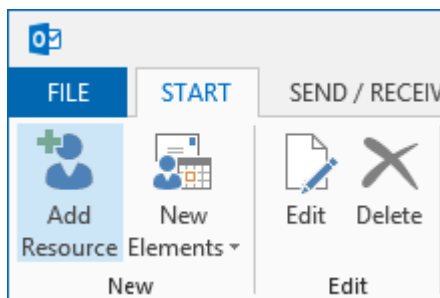
4. Show or hide **Divisions and Teams** in the resources and workload overview as needed. You can see that a team is not shown in the overview when the **Display** icon is gray . When it is blue  then it is shown in the overview. Alternatively, you can also drag-and-drop a team into the overview.

Please note It is not possible to create new departments (Divisions) in the workload overview. You can create, edit and delete departments in the **InLoox Options**, if you have the necessary administrator rights. You can also allocate resources to departments.

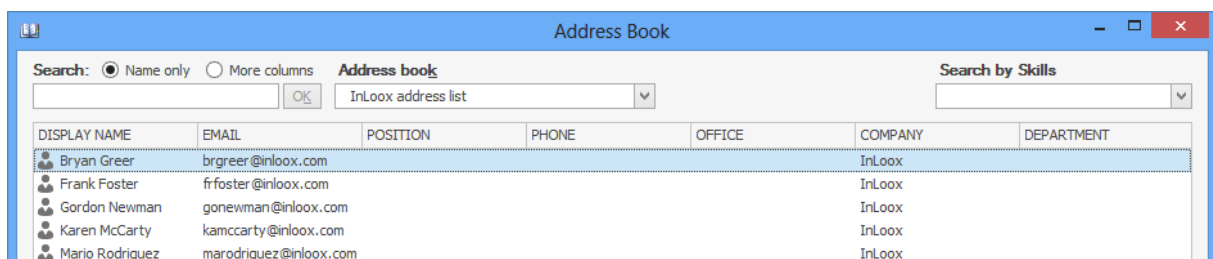
Add a new resource

You can also add a resource without assigning it to a team from the outset:

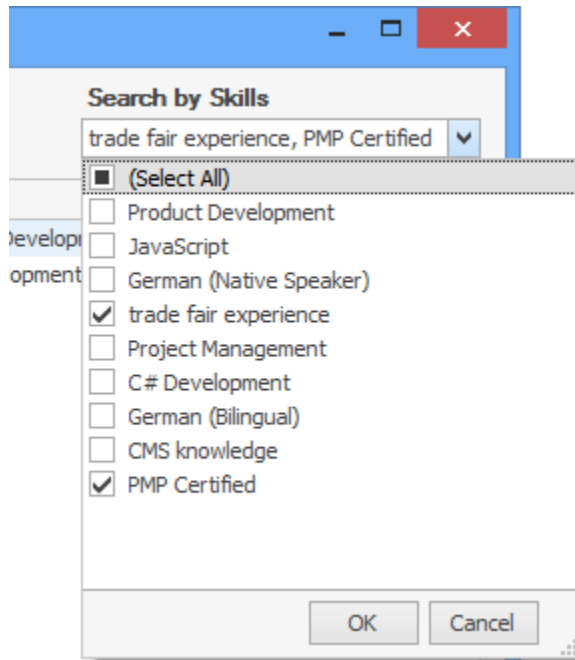
1. Go to **InLoox >> Allocation**
2. Click on **Add Resource** in the Ribbon



3. Select a resource from the **address book**, e.g. from the global address list or the InLoox address list



If you need a resource who has specific skills, then you can filter your address book so it only shows the resources who have these skills. To do so, click on **Search by Skills** on the upper right-hand corner of the dialog window and select the skills you need. It is possible to select more than one skill.



Please note When you filter by skills, all resources which have at least one of the specified skills are shown, not just the ones that possess all of the selected skills.

Please note You can define Skills in the **InLoox Options** and specify which resources in your company have which skills.

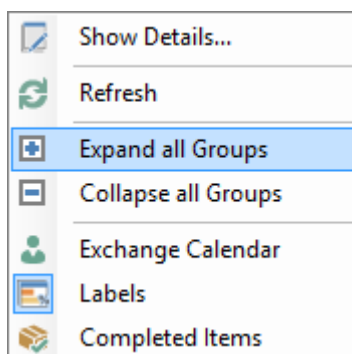
4. Confirm with **OK**. The new team member is sorted into the automatically created *Standard Team*.

Tip If a team member works on several projects, then you can just copy that member per drag-and-drop.

Re-Assign a task

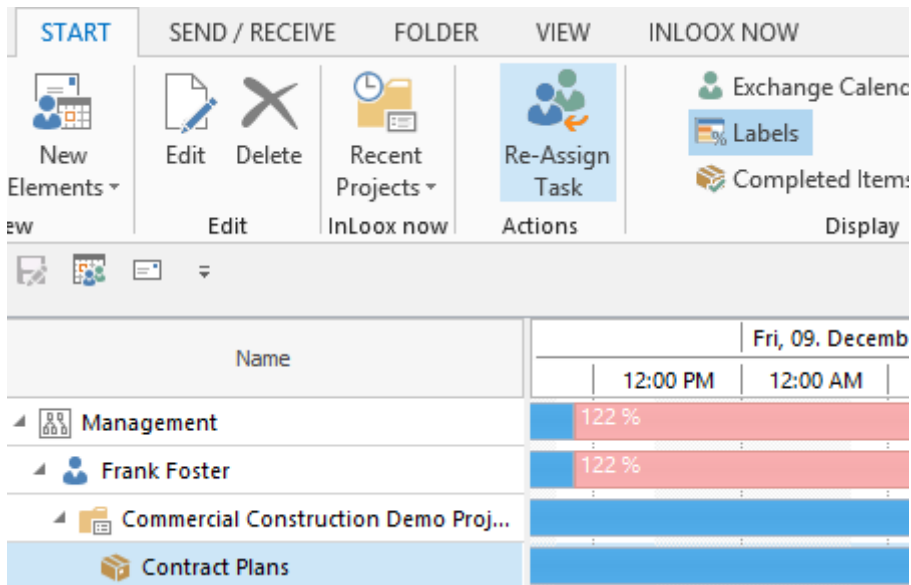
Follow these steps to re-assign a task, i.e. to allocate a task from one resource to another:

1. Expand all groups until you reach the tasks. To do so click on the arrow next to a group, then expand the resource, then expand the project. Or you can expand groups via the context menu

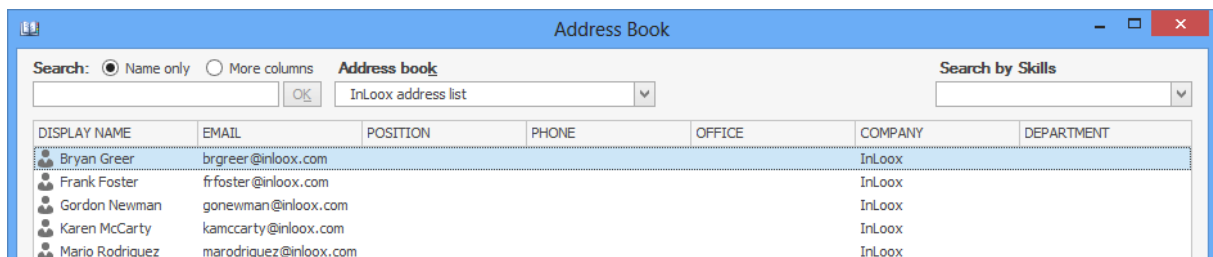


Note that this command only expands the next lower subordinate group, so you have to click on **Expand All Groups** until you get to the lowest level, the tasks.

2. Select the task you want to re-assign.
3. Click on **Re-Assign Task** in the ribbon.



4. Select the resource you want to assign the task to from the **address book**



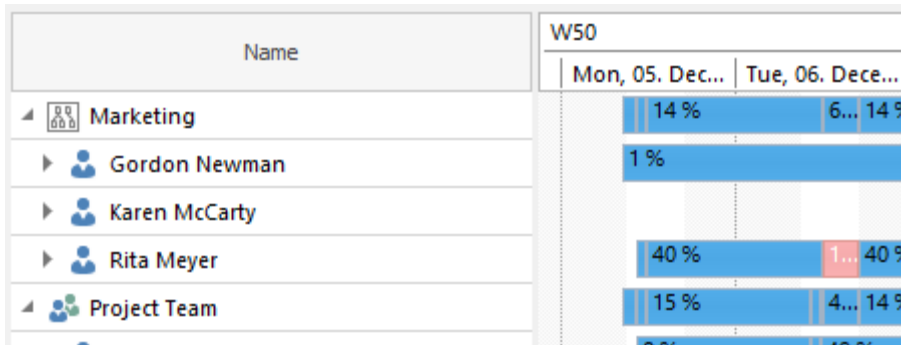
5. Click on **OK** to confirm.

Change the date range

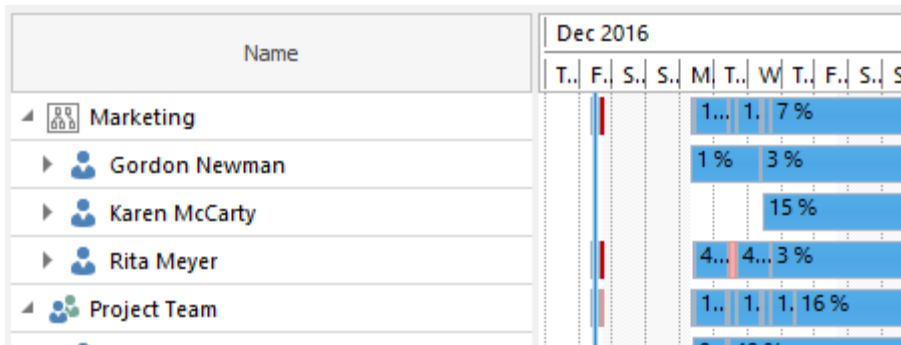
The workload overview enables you to see the workload of your entire company, of a department or of an individual resource in a specific time frame. You can specify the date range as needed: Today, Week, Month, Year, or a Custom date range.

1. To specify a time frame click on **Date Range** in the Ribbon
2. Select the required date range. The view of the workload overview changes depending on the chosen date range: e.g.

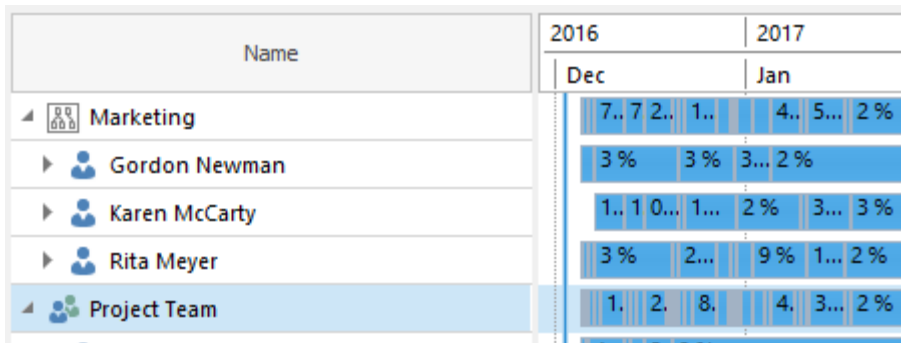
Week



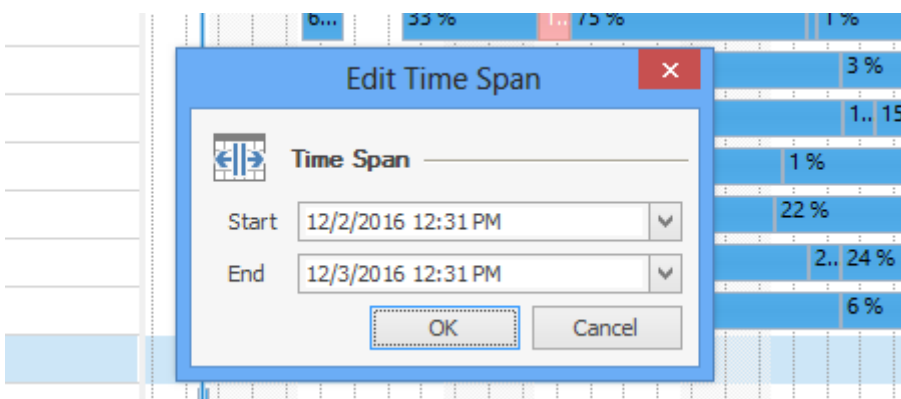
Month



Year



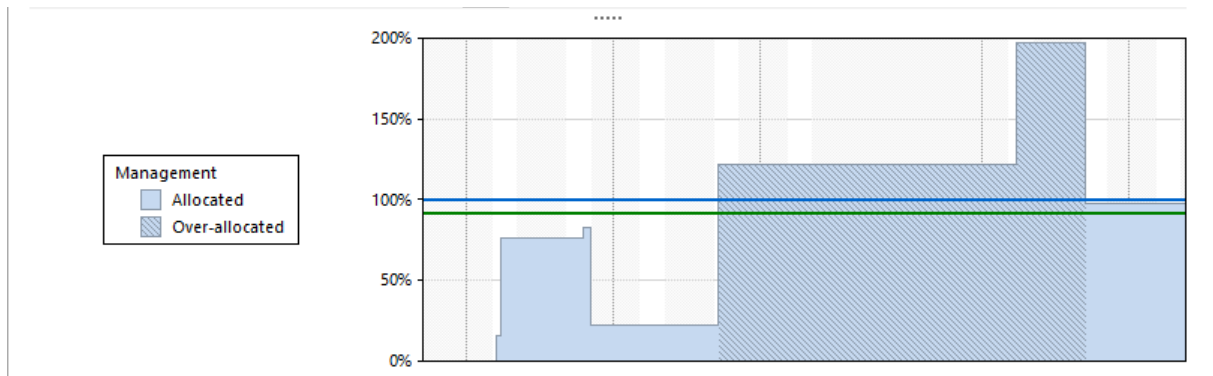
Custom date range



The workload chart

The workload chart below the resources overview shows you the cumulated workload data of your entire company, of a department, of a project team, or of an individual resource. It shows you a visual overview of the workload in the specified time range. The workload chart shows you the allocation of resources, depending on which group or resource you have selected from the resource list. This means that the workload chart is dependent on the resource overview. If you have not selected a group or resource from the resource list, then the workload chart won't show any data.

These rules apply to the workload chart:



- A **blue area** shows that a resource is busy in the specified time frame, but not over-allocated. The height of the bars show how busy a resource is in percent.
- A **striped blue area** shows that a resource is over-allocated in the specified time frame. The height of the bars show how busy – or over-allocated a resource is in percent.
- You can immediately see when a resource is working to capacity from the **horizontal blue line** at the height of 100%. So if the bars go over that line that means that a resources is over-allocated in that time frame.
- The **horizontal green line** shows the average workload of a team or resource. We recommend an average workload of 60-70%, as resources often have to do day-to-day business tasks in addition to project work. This way you ensure that your team members are not overworked.
- A **vertical blue line** displays the current day

Time tracking

With the time tracking feature in InLoox you can record time exposure for project-related tasks, document activities or track working hours for accounting. You can create time tracking entries either within an open project or in the time tracking overview. Both views allow you to create and edit time tracking entries or to create a reminder.

- The **time tracking overview** is located outside of the projects and shows the time tracking entries of all projects you are allowed to access.

- Whereas the **time tracking view within a project** just shows the time tracking entries of that project.

Create and edit time tracking entries

This chapter explains how to track working time in InLoox. The system automatically assigns the effort to the project plan and stores a separate cost record.

Create and edit time tracking entries within a project

1. Open an already existing project.
2. In the project open the **Start** tab and click on **Time** to open the time tracking view of your project.
3. The time tracking view shows all time tracking entries of a specific project. To create a new time tracking entry, click on **New**.
4. A side panel will open on the right side. Here you can add all important information regarding the new time tracking entry:
 - **Date and Duration:** Define start and end of your entry. Therefor you can use arguments like Start, End and Duration. Additionally, you can add a description of the activity you were working on.

Click on the arrow icons to edit the arguments.

Allocation: Assign the time tracking entry to a specific task or an activity. If you assign it to an activity, the drop-down-list will represent the structure of the planning. Assign a cost group to the entry by editing the field **Group**.

- **Details:** Mark the new time tracking entry with a green, yellow or red flag and choose the resource that performed the activity or task.

The screenshot shows a 'Details' side panel with the following fields:

- Flag:** A dropdown menu currently showing 'Yellow'.
- Performed by:** A text box containing the name 'Patricia Peters'.
- Billable:** A checkbox that is checked.

- **Documents:** Add additional documents, if needed.

5. When you have added all important facts, close the side panel by clicking on **X** directly next to **Date and Duration** in the right corner. Your changes have been saved already.

6. To edit an already existing time tracking entry, double-click on the entry in the time tracking view of your project. Alternatively, select the entry in the time tracking list and click on **Edit** on the **Edit** tab. The side panel will open on the right side and you can edit the information of the entry you have selected. Then close the side panel and your changes will be saved.

Create and edit time tracking entries in the time tracking overview

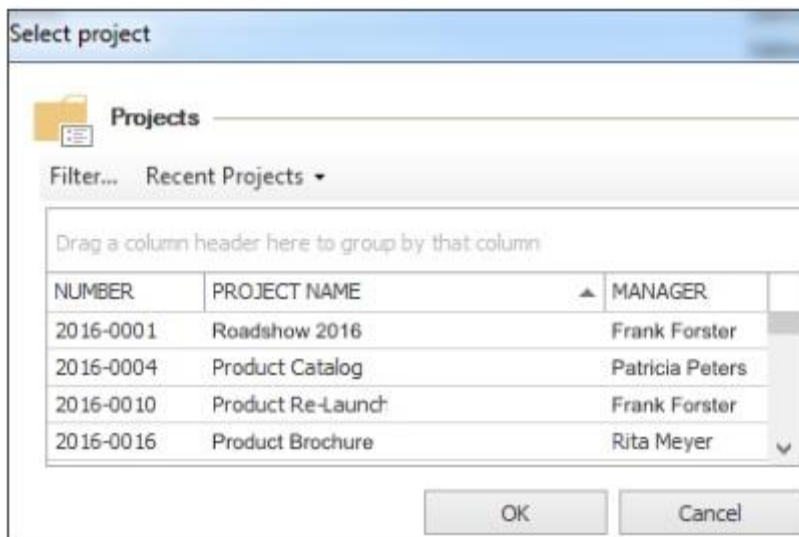
Even faster you can create time tracking entries in the time tracking overview over all projects:

1. Open the **InLoox now** or **InLoox PM** tab and click on **Time**, to access the time tracking overview for all projects.
2. This time tracking overview contains all time tracking entries of all projects.

Drag a column header here to group by that column					
PROJEC...	DESCRIPTION	PROJECT NAME	START	END	DURATION (HOURS)
2015-0012	Conference call	Media Consulting	8/1/2016...	8/1/2016...	3.08 hours
2016-0012	Budget	Media Consulting	4/28/201...	4/28/201...	0.10 hours
2016-0016	Organise kick-off event	Product Brochure	10/12/20...	10/12/20...	0.40 hours
2016-0011	Order catering	Fair 2016	4/28/201...	4/28/201...	0.13 hours
2016-0013	Sign-up	Convention New York	4/28/201...	4/28/201...	1.03 hours
2016-0014	Route planning	Roadshow	4/28/201...	4/28/201...	1.05 hours

3. In the **Start** tab click on **New Entry**, to create a new time tracking entry.

4. A dialog box will open. To assign the new entry to a project, select the project in the dialog box and click on **OK**.



5. Add all information in the dialog box **New Item**. Follow the procedure that is described above in *Create and edit time tracking entries within a project* in **4**.

6. When you have added all information, click on **OK**.

7. To edit an already existing time tracking entry, double-click on the entry in the time tracking overview. Alternatively, you can select it in the list and click on **Edit** in the **Start** tab. The dialog box **Edit Item** will open and you edit the information of the entry. Afterwards click on **OK**.

Create a reminder


By using reminders you can create automatic follow-ups for tasks that are not finished yet. You can create reminders for every time tracking entry. Additionally, you have the possibility to create a reminder for other persons. Reminders can be created either in the time tracking view within a project or in the time tracking overview over all projects.

How to create a reminder in the time tracking overview

1. Click on the **InLoox now** or **InLoox PM** tab and then select **Time**. The time tracking overview over all projects opens and shows all time tracking entries of all projects you are allowed to access.


2. Select a time tracking entry from the list. Afterwards click on **Create Reminder** in the **Start** tab.

3. A new dialog box will open:

- Define date and time of the reminder.
- Activate the check box **Also remind**, to additionally create the reminder for another person. Click on , to select a resource from the address book.
- Add additional information in the **Details** area.

4. To save the reminder, click on **OK**.

How to create a reminder in the time tracking view within a project

1. Open an already existing project and click on **Time** in the **Start** tab. The time tracking overview of your project opens and shows all time tracking entries of the project.
2. Select a time tracking entry from the list. Afterwards click on **Create Reminder** in the **Edit** tab.
3. A new dialog box will open:
 - Define date and time of the reminder.
 - Activate the check box **Also remind**, to additionally create the reminder for another person. Click on , to select a resource from the address book.
 - Add additional information in the **Details** area.
4. To save the reminder, click on **OK**.

Record working time with the InLoox stopwatch

Record your personal working time to-the-minute with the InLoox stopwatch. Afterwards you can assign the recorded working time directly to a project.

1. Open the **InLoox now** or **InLoox PM** tab and click on **Stopwatch**.
2. The stopwatch will pop-up in a new window:



- Click on **Start**, to start the recording.
 - Click on **Pause**, to pause the recording.
 - If you want to reset the stopwatch, click on **Reset Timer**.
3. To assign the recorded working time to a project, click on **Track Time**.
 4. The dialog box **Select Project** will open. Select a project from the list and click on **OK**.
 5. After that a new time tracking entry will open. The entry already includes the recorded start and duration of your activity. You can also add more information.
 6. When you are finished click on **OK**.

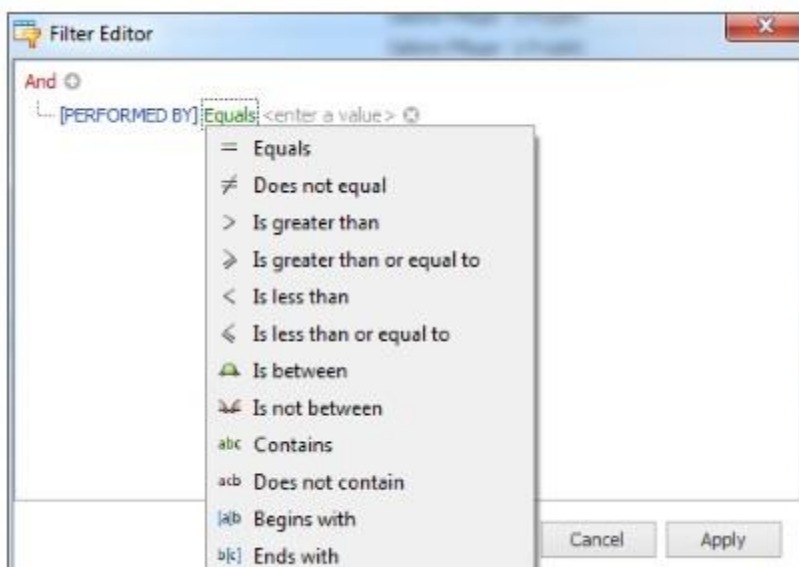
Customize time tracking views

The time tracking view within a specific project provides an overview over all time tracking entries of the project. Whereas the time tracking overview over all projects displays all time tracking entries of all projects. Both views can be individually customized regarding your personal needs.

Analytical filter

The analytical filter provides advanced options to easily find information and structure the time tracking view. To open the analytical filter click on ...

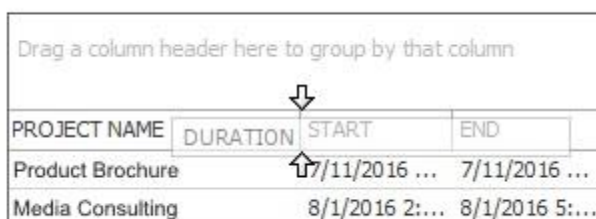
- ... **Filter** on the **Start** tab. (time tracking overview over all projects)
- ... **Edit Filter** on the **View** tab. (time tracking view within a project)



Select fields

In the time tracking views you can add various additional information by adding more column headings.

1. To add new column headings, right-click and choose **Select fields** in the context menu.
2. A new dialog box that displays all available fields will open. If you want to add one of the fields to your list, drag it to your preferred location in the list. Two arrows indicate the position of the new column.



3. To delete a column heading from the list, drag the field back into the dialog box or into the empty area below the list.

Group feature

1. To group time tracking entries by a specific column, drag a column header into the field directly above the column headers.

PERFORMED BY ▾			
FLAG	START	END	DESCRIPTION
▾ Frank Foster (1.28 hours)			
	8/8/2016 9:...	8/8/2016 10:47 ...	Layout meeting
▾ Patricia Peters (1.07 hours)			
▶	10/12/2016...	10/12/2016 9:4...	PowerPoint presentation for kick-off event
	8/17/2016 ...	8/17/2016 9:10 ...	Budget
▾ Rita Meyer (2.25 hours)			
▶	8/4/2016 2:...	8/4/2016 4:00 PM	Kick-off event
	8/15/2016 ...	8/15/2016 8:47 ...	Conference call

2. By clicking on the arrow next to the group criteria, you can change the order from ascending to descending or the other way round.

3. Here you can use an additional filter option: Move the cursor over the group criteria. A filter icon appears in the right corner. Click on that icon to further limit the criteria.



Sort time tracking entries

Additionally, you can sort time tracking entries by column headings. Click on the column heading and then click again to change the sorting order.

Save customized views

After you have customized your time tracking views regarding your personal needs, you can save those views for a later time.

- The time tracking view within a project automatically saves your adjustments. When you are opening the project the next time, your customized view will be automatically displayed.

- In the time tracking overview over all projects you have to save your customized view. By saving a customized view you can make it accessible for other users. How to save your customized view in the time tracking overview over all projects will be explained in the following step-by-step.

Save a customized view in the time tracking overview over all projects

1. Open the **InLoox now** or **InLoox PM** tab and then click on **Time**. The time tracking overview over all projects opens. Customize the view regarding your needs.
2. To save the customized view, open the **Start** tab and click on **Save** and then on **Save current view**.
3. Name the view (e.g. Grouped by projects) and activate the check box **Visible for all users**, if you want to make your view accessible for other users. Then click on **OK**.
4. You can find the view in the tree structure on the left side directly below time.

