

# User Manual



## User Manual InLoox 10

InLoox Web App

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## First Steps in InLoox Web App

### New Account

In the following we explain step-by-step how to create a new account for InLoox 10 Web App.

Simply type [www.inlooxnow.com](http://www.inlooxnow.com) in your browser. InLoox Web App supports these browsers and browser versions:

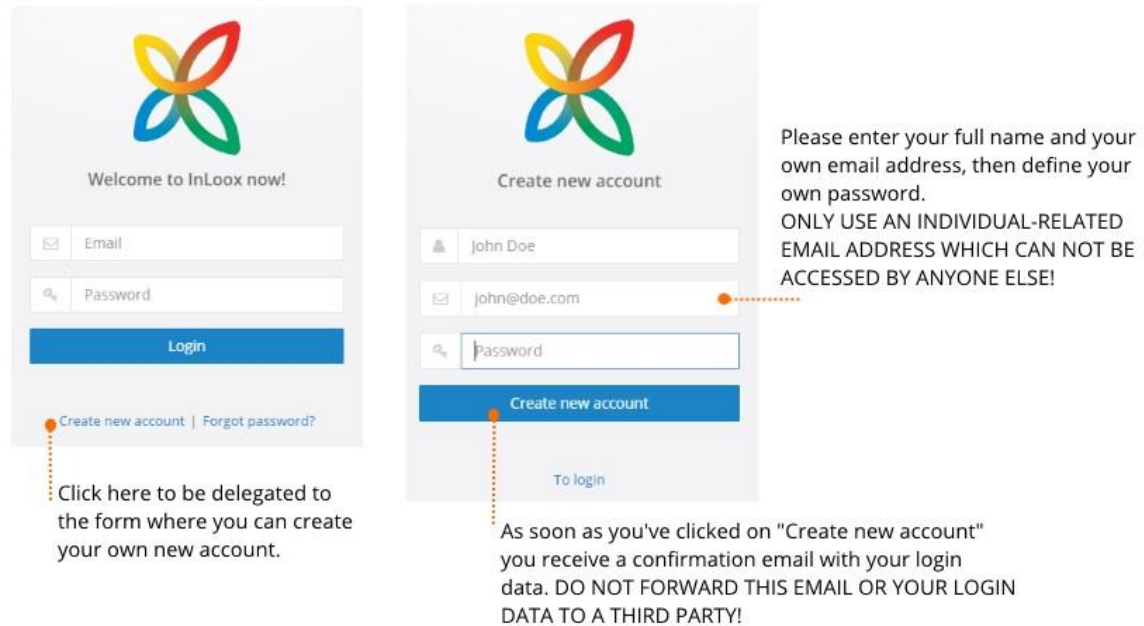
- Internet Explorer 10, 11 and higher
- Mozilla Firefox 16 and higher
- Safari 12.1 and higher (Mac, iPhone, iPad)
- Google Chrome 38 and higher

**TIP** We highly recommend updating your browser regularly to the latest version. This ensures best performance and that InLoox Web App is displayed properly.

At the login-site, click on [Create new account](#) and then enter your full name, your own, individual-related email address and define your own password. Then click [Create new account](#). You'll immediately receive a confirmation email with your login data.

**Do not forward this email to a third party and do not share your InLoox Web App login data with anybody.**

**PLEASE NOTE** As the creator of your or your company's InLoox Web App account you hold the administrator rights. This means that you alone have access to *Options*, which you access by clicking on your name in the Top Bar and selecting *Options*. This is where, in *Options-Permissions-User Based*, you may change the user-based permissions and e.g. transfer the administrator rights to another InLoox Web App user.

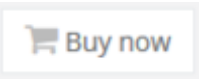


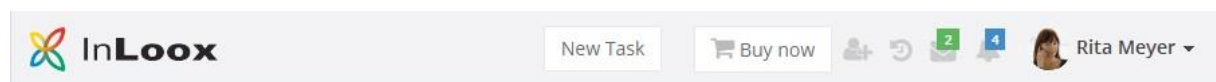
### Login for InLoox PM Enterprise Users



In case you are using InLoox Web App in combination with InLoox PM for Outlook, please use your InLoox PM for Outlook login name and password to access InLoox Web App. You do not need to create a new account! All your data is synchronized and transferred from InLoox PM for Outlook to InLoox PM Web App.


### Top Bar

Use the Top Bar to quickly create a *New Task* and navigate to the *Workplace* by clicking on the InLoox



Logo from every page of InLoox Web App. Click on  if you wish to upgrade your InLoox Web App edition and access the settings by clicking on your name.




If you click on  (*recent projects*) you can access your recently created projects. You see how many notifications  from the *Chat* and the project notes you have received and how many new tasks have been assigned to you.

Alerts  notify you about upcoming tasks. Click on these icons, and you can directly go to the respective chat discussion, the project notes and newly assigned tasks as well as your upcoming tasks.

## Invite others to your InLoox Web App Account

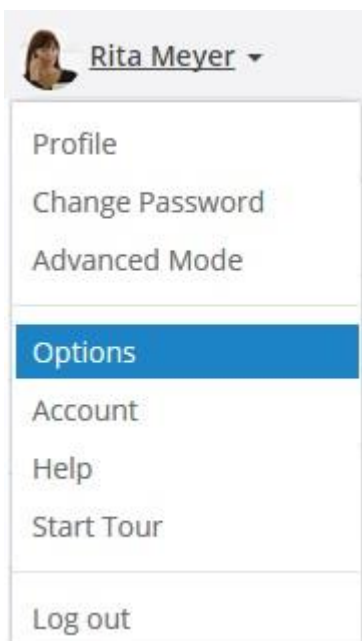
If you have purchased several license keys or if you want to invite colleagues to your InLoox Web App test account, please click on . Enter a valid email address of the person you want to invite, select the language (English or German) the email should be written in and click . The invited person receives an email with a link to your InLoox Web App account and is asked to select their own password.

**IMPORTANT** As soon as you invite someone to your InLoox Web App account, a new contact form is created for this person. It is advisable for you, as administrator of the account, to go to *Options* and then to *Permissions-User Based Permissions* to give the invited person full access to InLoox Web App.

To do so, please click on  in the person's tab and then click *Select All*. Now, the newly invited person has all the necessary permissions to access every area of InLoox Web App. This is especially important during the initial testing-phase, when you want to fully experience all the collaborative features InLoox Web App offers.

## Settings

To access the settings, click on your name in the Top Bar. Here you can go to your *Profile*, to upload a profile picture, *Change your Password*, change into *Advanced Mode*, access *Options*, your *Account*, and the *Help*-documentaion, start the demo *Tour*, or *Log out*.



**PLEASE NOTE:** You can only access *Options* and *Account* if you have administrator permissions for the InLoox Web App account you are working in. If you have created the account, you are automatically given administrator permissions.



## Simple vs. Advanced Mode

	Ribbon	Simple Mode	Advanced Mode
Multi-Project and Task Management	Workplace	✓	✓
	Budgeting of tasks	✗	✓
	Add documents to tasks	✗	✓
	Custom fields	✗	✓
	Tasks (in table view)	✗	✓
	Documents	✓	✓
	Folder view	✗	✓
	People	✓	✓
	Add new contacts	✓	✓
	Invite people	✓	✓
	Create and manage address books	✗	✓
	Table view	✗	✓
	Projects	✓	✓
	Table view	✗	✓
	Filter options, choose columns, save and manage views	✗	✓
	Time	✓	✓
	Table view	✗	✓
	Filter options, choose columns, save and manage views	✗	✓
Insights	✗	✓	
Single-Project Management	Manage	✓	✓
	Categories	✗	✓
	Departments	✗	✓
	Tasks (Kanban board)	✓	✓
	Documents	✓	✓
	Folder view	✗	✓
	Lists	✓	✓
	Link lists to	✗	✓
	Time	✓	✓
	Planning	✓	✓
Budgets	✗	✓	

## Creating a Task


After logging in, you are at the *Workplace*. Here you get a concise overview of all your tasks. The *Workplace* also has a calendar and a stream, which keeps you informed on any news or updates in your tasks and projects. Our [Video Tutorial](#) shortly introduces task management with Kanban in the projects.

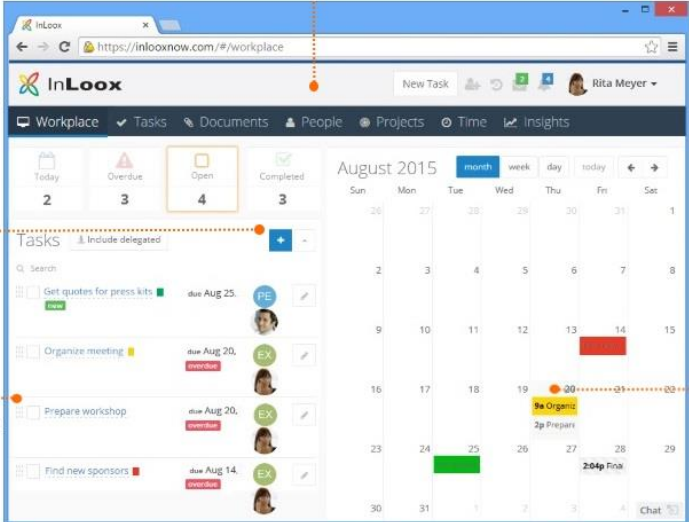
There are three ways to create a new task:

**1. The Quickest Way:**  
Click on  to create a new task, which immediately appears in the tasklist below. You can edit your tasks by clicking on  which opens a dialogue window where you can also delete your tasks or assign the task to someone else.



**2. The Visual Way:**  
Click on a day in the calendar to create a new task. A dialogue window opens where you can edit e.g. the date, effort, and assignee.

**3. The Universal Way:**  
Click on New Task in the Top Bar to open the Edit Task window. This button lets you create a new task from everywhere in InLoox Web App.

If you want to check a task off the list, simply click into the box  next to the task. This task is then moved into the Completed Tasks list.



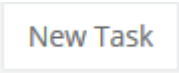
### 1. The quickest way


Click on , give your new task a name and press ENTER. The new task does not yet have a start or due date or effort. If you want to change that, drag the task into the calendar to give it a due date or click on  to open the *Edit Task* window where you can edit all the details.

### 2. The visual way

If you already know the due date of a task, you can e.g. click on Tuesday, 10 a.m. and edit the task.

### 3. The universal way

Click on the button  in the Top Bar to open the *Edit Task* window. This button enables you to create new tasks from everywhere in InLoox Web App.

If you want to mark a task as done, set a check in the box  of the completed task. It is now displayed under the completed tasks.

**PLEASE NOTE** Tasks that you create either in the Top Bar or *Workplace* are your personal tasks without an assigned project. Nobody else can see or edit these tasks.




## Edit a Task

This is the dialog box that opens whenever you edit a task or create a new task by clicking on the New Task button in the Top Bar or by clicking in the calendar to create a new task.

The screenshot shows the 'Edit Task' dialog box. At the top, the title 'Edit Task' is centered, with a close button (X) on the right. Below the title is a text input field containing 'Organize meeting'. Underneath are four radio buttons: 'Today', 'Tomorrow', 'Next Week', and 'Anytime'. Below these are two date-time pickers: 'Start Aug 20, 2015 09:00 am' and 'End Aug 20, 2015 12:00 pm'. A blue horizontal bar below the end date shows a clock icon and '3h'. Below this bar are two sections: 'Effort' with a dropdown arrow and 'Description' with a dropdown arrow and a document icon. The 'Details' section has five tabs: 'Assign' (active), 'Color', 'Budget', 'Documents', and 'Custom Fields'. Under the 'Assign' tab, there is a user profile for 'Rita Meyer' and a 'Select project' button with a gear icon. At the bottom, there are three buttons: 'Delete' (red outline), 'Cancel' (white outline), and 'OK' (blue solid).

### Start and End Date

You can either only select a start or end date, or select both. The end date of a task is its due date. If you e.g. click on Next Week, the start date is the Monday and the end (due) date is the Friday of next week. If you select Anytime, neither start nor end date is set.

If you click on  you can select an individual date and also set a time.

The time line shows you the duration between the start and end date.

**PLEASE NOTE** The duration in the time line is not relevant for the time effort you have to put in to complete the task. It only shows you the time frame during which you can complete the task, with the due date as the latest date until the task is to be completed on.

### Effort

This is where you select who much time it will take you to complete the task. The effort of a task is relevant for the calculation of a person's workload, for budgets and for time tracking entries.

### Description

Add a short text as a description to the task.

### Details - Assign a Person and/or Select a Project

You can assign a task to a person and you can select a project for which this task needs to be completed. If you have created the task, you profile picture and name are shown under Assign. Click on it and select another person that works on your InLoox Web App Account to complete the task

**IMPORTANT! PLEASE NOTE** If you delegate a task to another person, this task is no longer listed in the task list in your Workplace and can no longer be seen or edited by you.

If you want to turn the task into a project-related task, click on *Select project*, chose a project from the list and click OK to close the dialog box.

**PLEASE NOTE** If the task is assigned to you and to a project, it is listed both in the task list in Workplace and in the Kanban board (Tasks) in the project.

### Details - Color

If you pick a color for your task, a small colored card is shown next to task name in the talk list in your Workplace. If the task is shown in the calendar, the calendar entry is in this color.

**TIP** Use a color coding system for tasks that are not combined in a project. E.g. use red for urgent phone calls or blue for out-of-office appointments.

### Additional Functions in the Advanced Mode

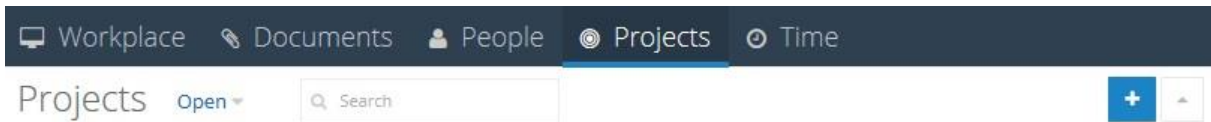
If you switch into *Advanced Mode*, you can edit further details the tabs *Budget*, *Documents* and *Custom Fields*.


### Combine Tasks as a Project

Simple task management can be done in the *Workplace*. If you have several tasks that are dependent on each other or have to be performed within a certain order it is advisable to combine them within a project.

### Creating a Project

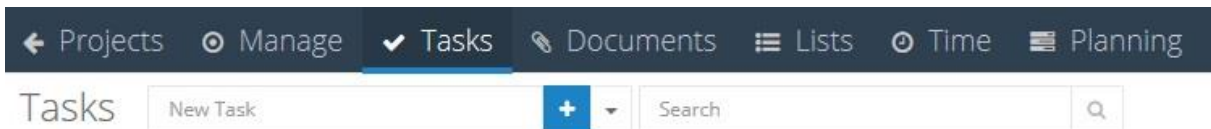





First, navigate to *Projects* and there click on . You are directed to the *Manage* site, where you can edit the project's details. You are automatically assigned as the project manager.

Now, there are two possibilities to fill this project with tasks:

### 1. Create Project Tasks





While you are still in the project, click on *Tasks* in the ribbon and then into the *New Task* text box to

give it a name. Click  and the new task is created, displayed in the left column. Click on the task and drag it into another column, if you'd like to change the task's status e.g. into *In Progress*.

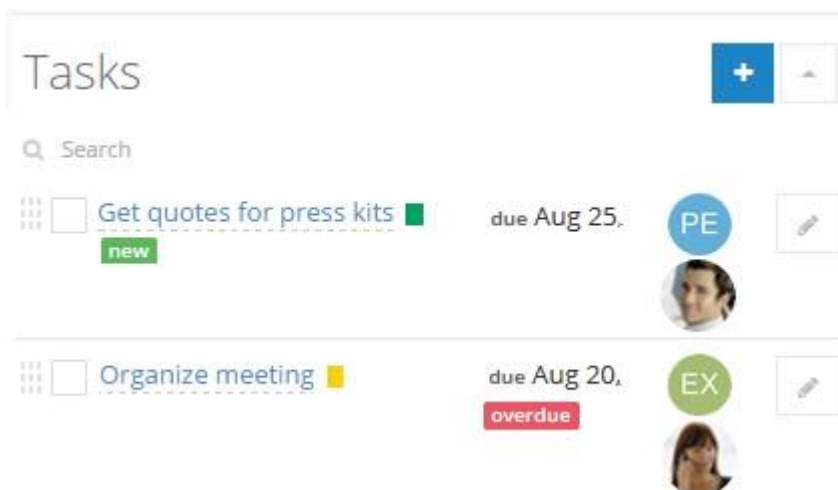
### 2. Assign Tasks to an Existing Project

In order to assign existing tasks to an existing project, navigate back to the *Workplace* by either

clicking on  and then on *Workplace*, or by clicking the InLoox logo in the Top Bar.

Now click on  to open the *Edit Task* window and click on the tab *Details*. There you click on  and select the project you want to assign the task to. When you click on *OK*, the project's picture, which is clickable and will get you directly to the project's *Manage* site, is shown next to the task.


**EXAMPLE** Here you see two tasks assigned to two different projects. Below the projects' pictures, you see either your own profile picture, if it is a task created by you, or the profile picture of the person that assigned the task to you.



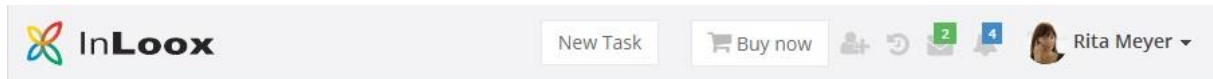
## Creating New Contacts and Inviting Team Members

You can create contact profiles for people who do not have access to your InLoox Web App account, such as your clients, service providers or freelancers. If you have purchased several InLoox Web App licenses, however, you can invite team members and work colleagues to collaborate with you on your InLoox Web App account.



### New Contacts - No Access to InLoox Web App

In order to create new contact profiles, click on *People* and there on . The *New Contact* window opens, where you can add all necessary details like phone number, mail address or website.

### Inviting Team Members and Work Colleagues



If you have purchased several user licenses, and have administrator permissions, you can invite others to your InLoox Web App account.

Click on  in the Top Bar, enter the email address of the person you want to invite, select English or German as the email's language and click on . The invited user receives an invitation email with a link to your account. The person chooses a password and can then access your InLoox Web App account and you can work together.

**TIP** To make sure that new users can start working with InLoox Web App right away, you need to assign them certain permissions. To do that, go to *Options-Permissions-User Based*, click on the arrow next to a user and click *Select All*. Now, the newly invited person has all the necessary permissions to access every area of InLoox Web App. This is especially important during the initial testing-phase, when you want to fully experience all the collaborative features InLoox Web App offers.