User Manual

User Manual InLoox 11

InLoox for Windows
InLoox for Outlook

⚠ **Note:** This manual refers to an outdated version (InLoox 11) and is no longer updated. It is provided for archival and reference purposes only.

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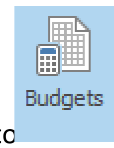
Content

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.

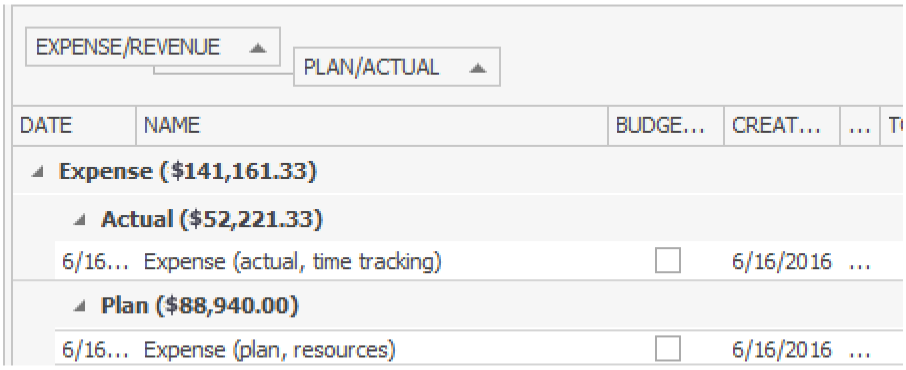
Budget types

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.



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.

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, click on a budget or budget item.

2. In the side panel under Documents, you can search and add documents. To add a new document, click **Browse**. Then you can select the corresponding document from your computer. Once you click Open, the document is linked to the budget/budget item.

3. If you already have available documents, they will be displayed. You can select the desired document by mouse click.

4. The Advanced field opens a dialog box. Here you have the possibility to search for documents in more detail. You also have the option here to add further documents via New file (e.g. a file, file link or an Internet link).

Create a new project

This chapter explains step-by-step how to create a new project. 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.

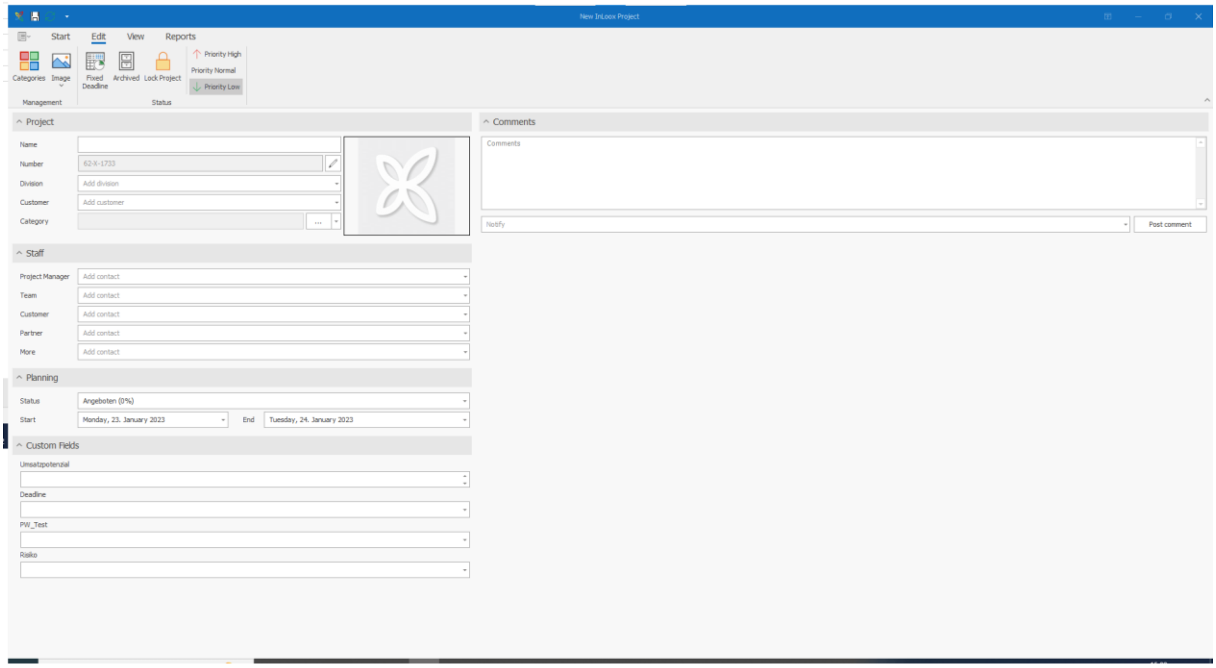
How to create a new project

In the following description we will explain step-by-step how to create a new project with InLoox 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 the project list, which gives you an overview about all your projects.

2. To create a new project, click on the Plus icon **New Project** in the upper left corner.

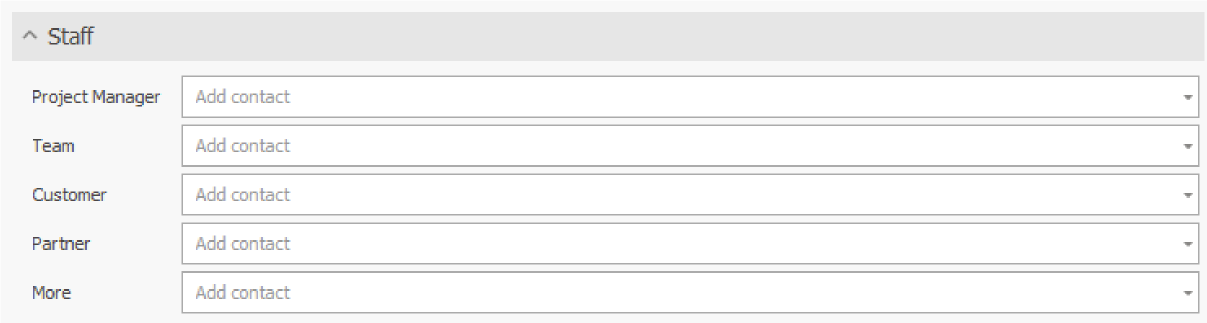
3. The management form will open.



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 settings.
- Assign a **customer** to your project. **Please note** Administrators can edit customers and customer numbers in the InLoox settings.
- 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. 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.



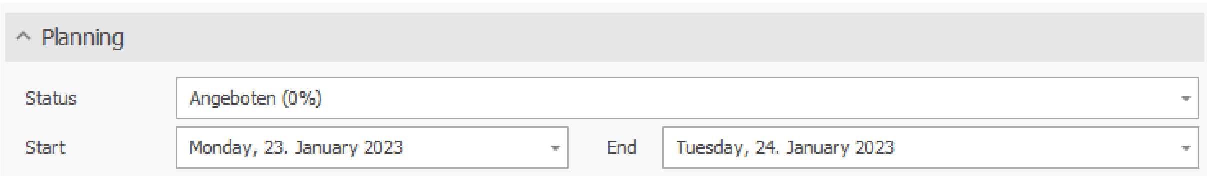
By setting up a project team, you define the access permissions for the project. (For more information on how to share permissions or add users to the list, please see Set user permissions.)

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

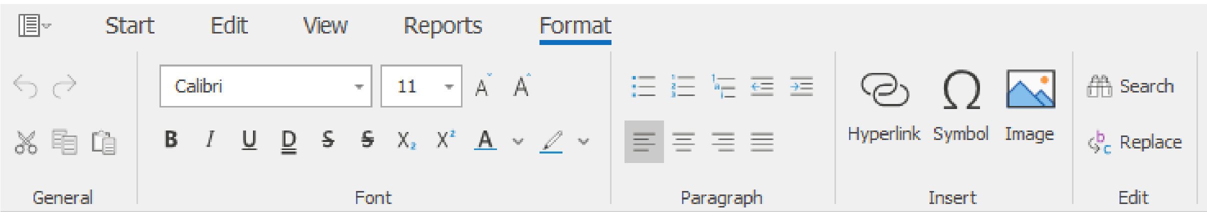
5. Select **start and end dates** as well as the **status** of the project.



Please note Administrators can individually define the project status in the InLoox Settings.

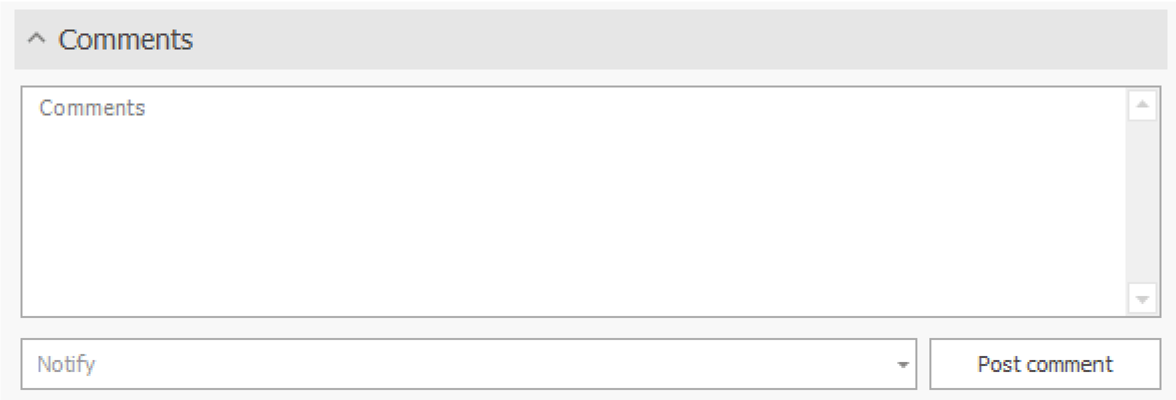
6. Use **comments** to leave any additional information on the project.

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



- **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 comment.

7. To save your comment click on **Post Comment.**

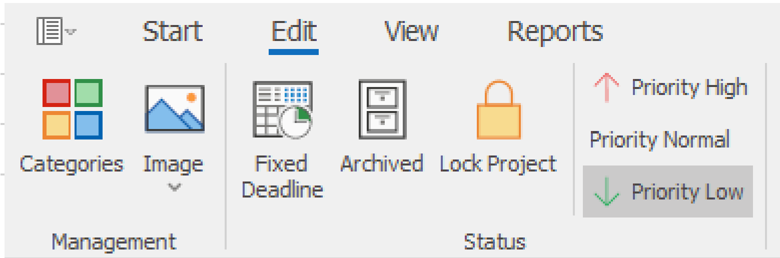


Your file is now linked to the note and can be accessed by pushing the Ctrl-button and clicking on the link.

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

Please note Administrators can define in the InLoox settings, if notes are sent via email, as Outlook-tasks or as Outlook meeting requests.

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



- **Fixed Deadline:** If necessary, mark your project as a deadline project, such as trade fair appearances. For deadline projects, the project end date is highlighted in the planning by a red line.
- **Archived:** When you archive the project, you automatically move it to the archive.
- **Lock Project:** Administrators can use this command to protect the project from changes.
- **Priority High/Normal/Low:** Set the urgency of your project. Later, the projects can be sorted in the project list based on the priority.

9. 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.

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

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.

Dashboard view

The dashboard allows you to view many areas of your projects at a glance and provides a quick overview of the current project information without having to open the individual projects.

The view can be configured individually for each user.

TIP As the dashboards provide very extensive and sometimes complex functions, we recommend our dashboard training course.

Find out more at On-site workshop: Dashboards and reports or Dashboard and report training at the InLoox training center.

Creating and managing dashboards

1. first open the Dashboards view using the following options:
    - In the Outlook client, click on the InLoox view and in the tree structure on Dashboard
    - In InLoox for Windows, click on Dashboards in the lower navigation bar
2. to create a dashboard, select the New dashboard button in the New section of the top ribbon
3. the Dashboard Designer opens and you can start creating your dashboard template.
4. to save a dashboard template, select the Save button in the top ribbon. It is also possible to save an existing template as a new template. To do this, select Save as.

Explanation of the dashboard elements

Pivot table

The Pivot dashboard element is a table that displays multidimensional data in a simple table.

Values: This area displays data elements that are used to calculate the data in the pivot table.

Columns: This area displays data elements that are used for the column headers.

Rows: This area displays data elements that are used for the row headers

Layout & style: If columns and rows contain many data elements, their headers are grouped hierarchically. You can expand or collapse these groupings. To do this, switch to the Layout & style area in the ribbon and open the Initial state drop-down menu.

Table

The dashboard element table contains simple columns. These are filled via the selected fields of the data sources. The names of these fields are used here as column headers.

New columns: This area displays the data elements that are used for the column headings and therefore the content of the respective column.

Sparkline: This area shows data elements that indicate the change in totals over time.

Layout & Style: Here you can join rows or cells, edit separator lines and switch alternating row colors on or off.

Diagram

The dashboard element chart displays a simple bar chart of the desired values. The values can be used as totals for this purpose.

Values: This area displays data elements for the Y-axis.

Arguments: This area displays data elements for the X-axis.

Series: This area displays data elements whose values are used for series. These values are used as headings in the legend.

Layout & style: Various settings can be made here for the legend of the chart, the display of the bars and the respective axes. It is also possible to rotate (transpose) the chart.

Circle

The Circle dashboard element displays a simple pie chart of the desired values. The values can be used as totals for this purpose.

Values: This area displays data elements that define the respective portions of circle segments.

Arguments: This area displays data elements for the headings of the circle segments.

Series: This area displays data elements whose values are used for series. These values are used as headings in the legend.

Layout & style: The position and content of the label, the design of the diagram and the desired colors for the circle segments can be set here.

Measuring device

The Meter dashboard element displays values in the form of a meter diagram.

Measuring devices (current, target): This area displays data elements whose values are calculated in the measuring devices. Data elements are arranged in containers where up to two elements can be displayed. The first data element indicates the current data, the second element the target data. If two elements are present, the measuring device shows the deviation between target and actual values.

Series: This area displays data elements for the headings of the measuring devices.

Layout & style: The style of the measuring devices and their labels can be set here.

Maps

The Cards dashboard element displays values in the form of small cards.

Cards (current, target): This area displays data elements whose values are calculated in the cards. Data elements are arranged in containers where up to two elements can be displayed. The first data element indicates the current data, the second the target data. If two data elements are present, the meter shows the deviation between target and actual values.

Series: This area displays data elements for the headings of cards.

Sparkline: This area graphically displays the date dimension within the cards based on the selected data source.

Layout & style: The names and arrangement of the cards can be edited here.

Area filter

The area filter dashboard element can filter other dashboard elements. It represents a diagram with sliders. These sliders can be used to filter the values on the argument axes.

Values: This area displays data elements for the Y-axis.

Argument: This area shows data elements for the X-axis. Filtering is based on these values.

Series: This area displays data elements whose values are used for series.

Layout & Style: Here you can edit the series type, the colors of the element and the desired time period, among other things.

Pictures

The Images dashboard element displays imported or uploaded images.

Attributes: Bound images can be integrated using attributes. For example, it is possible to display a specific image based on a different value.

Layout & style: Among other things, the display of the image and its alignment can be set here.

Text field

The dashboard element text field displays simple texts in the dashboard.

Values: This area displays data elements for the text to be displayed. InLoox allows multi-line texts.

Layout & Style: Static text can be edited here. You can also add fields from the data sources to fill the text field dynamically with texts (e.g. project manager).

Designing dashboards with the Dashboard Designer

To design a dashboard, open an existing dashboard via the Open Designer ribbon button or create a new dashboard via the New Dashboard ribbon button.

1. first open the Dashboard Designer and select the Tasks data source on the left-hand side. The corresponding properties and fields of the tasks are now listed below.

2. create a simple table using the Table ribbon button and drag and drop the following fields from the data source to New column:

Project_Name

TaskItem_Name

Resource_DisplayName

TaskItem_WorkAmount

3. right-click in the table to open the context menu and select Edit names. In the dialog that now appears, you can adjust the table name and the headings in the column headers. Then confirm with OK.

4. now create a pie chart using the Circle ribbon button. Hold down the left mouse button next to the Circle 1 heading and drag the pie chart element to the desired position. A blue bar shows you where the element will be placed. Then release the left mouse button to place the element above the table.

5. at the blue marked edges you can drag the height to the desired size with the mouse.

6. now drag the TaskItem_Name field to the Value area, the TaskItem_IsDone field to Argument and the Resource_DisplayName field to Series. The dashboard element now spans several pie charts as follows. You receive one pie chart per employee. This sets the number of items to values that are present in TaskItem_IsDone (here there are two: True and False). The size of the respective circle segment is determined by the number of tasks (counted via TaskItem_Name).

7. now select the Filter elements button in the top ribbon and add List field. Place this on the right-hand side of the dashboard, just like the pie chart element before. The width of the list box can now be changed using the blue borders. Now drag the Project_DivisionName field onto the Dimension field of the list box.

8. now save the dashboard using the corresponding buttons in the ribbon and close the Dashboard Designer.

9 The dashboard is now ready for use. You have your task list at the bottom and the pie charts above it, which show the completed vs. uncompleted tasks per employee, as well as a filter for the departments on the right.

Filters

On the Data tab, you have the option of defining filters.

Main filter (master filter)

It is possible to use any field from a data source as a filter for the entire dashboard (main filter). You can select the elements for the main filter area (charts, pie segments, table cells, etc.) to filter the data according to the selected values.

The main filter supports two selection modes. These can be found in the respective dashboard element in the upper ribbon in the Data area:

- Multiple allows you to filter across multiple elements at the same time. To activate the filter, click on Multiple master filter.
- Single allows you to use only one element as a filter. If this mode is active, the default selection is set as the main filter element. You can only change the selection, but not delete it. To activate the filter, click on Single master filter.

Cross-data source filtering

Since InLoox 11, it is possible to use cross-data source filtering of dashboard elements. This is used to filter dashboard elements that are linked to different data sources. To use this type of filter, you must enter the field that is to be filtered later in the dashboard elements to be filtered.

Drill-down

You can use the drill-down function to change the level of detail of dashboard elements. The drill-down function shows the details, the drill-up function shows general information. To return to the original level, use drill-up or the context menu.

Documents

Add and edit project documents

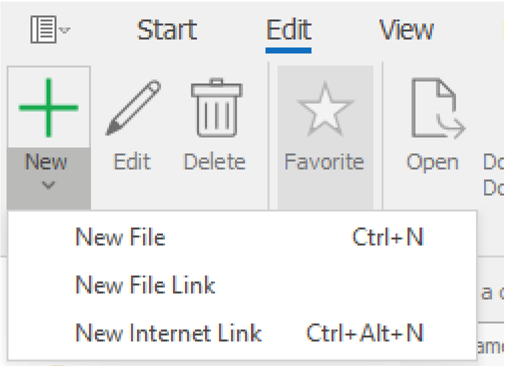
Work with file links to save storage space and avoid duplicates. File links don’t occupy storage space, as documents aren’t saved directly in Microsoft Outlook or on the Exchange Server.

Please note The access permissions of the original document still exist in InLoox equally whether you upload the document or 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 Internet Link**: By using this feature, you can add for example web addresses. After you have clicked on **New Internet Link**, a side panel opens on the right side. In the **URL** field you can save the web address.

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

FileName	SourceFolder	FileType	FileSize	DescriptionText
Getting Started Guide.ppt		Microsoft PowerPoint...	377 KB	
Kick-Off Meeting.docx	[illegible]	Microsoft Word Docu...	11 KB	
https://www.inloox.com/		URL	0 B	

NOTE You can recognize the file link by the fact that the path is displayed in the Sourcefolder column.

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 **Basic Information** area.

- In the field **File name** you can see the name of the document. You can't edit this field.
- The **State** field allows you to leave notes about the processing status like *in progress* or *completed.*
- In the **Description** 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](#).

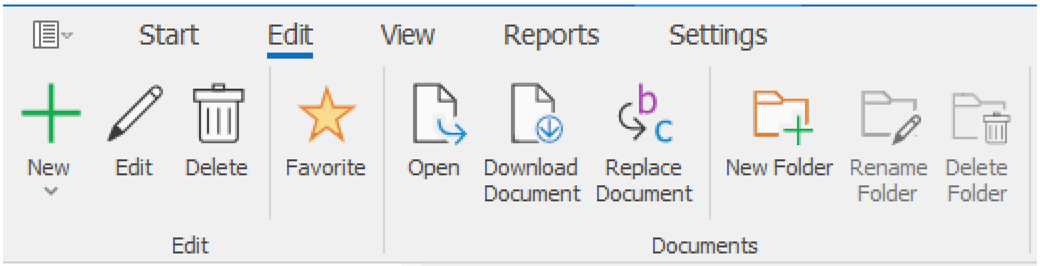
4. When you have finished editing the document, close the side panel on the right side next to the **Basic Information** area. Your changes will be saved automatically.

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:

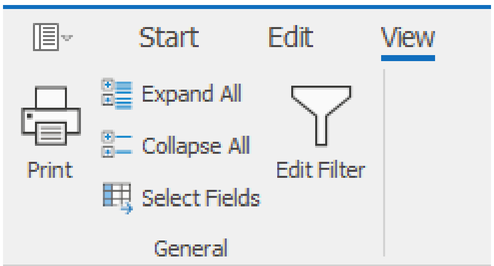
1. Double-click to open an existing project.
2. To open the document list, click on **Documents** in the **Start** tab.

Features on the Edit tab



- **Open**: To open a document, choose one from the list and click on Open. You need specific user permissions for this action.
- **Download Document:** Select a document from the list and click Download Document. The download folder in the Explorer opens - this is where the document was saved.
- **Replace Document:** Select a document from the list and click Replace Document. You can now replace this document with another one. Attention: this is only possible if you have previously uploaded a file (and not if you have only uploaded a file link).
- **New Folder**: 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.

Features on the View tab



- **Expand all/Collapse all**: Change the view of the document folder tree structure by clicking on Expand all/Collapse all.
- **Select Fields**: Filter the document to quickly find needed information. Click on a field in the dialog box and frag 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.

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.

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.

Install InLoox On-Prem

If you want to test or have purchased the locally installed edition InLoox On-Prem, please download the whitepapers for the installation of the InLoox Apps and the InLoox On-Prem Server here: www.inloox.com/products/documents/.

On the InLoox website at www.inloox.com/support/download/produktdownload please download the InLoox On-Prem **Server Installer file** and the **Apps Installer file**.

Global task view

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 settings.

Tasks that are overdue appear in red.

Create, edit and delete tasks

Create and edit tasks

To create a new task, click **New task** on the **Start** tab in the ribbon. You will be automatically entered as the responsible resource for this task.

To edit this task further, click **Edit** on the **Start** tab in the ribbon.

1. In the page panel on the right, you can now enter a new name for the task as well as a description of the task.
2. You can also specify the amount of time you plan to spend on completing the task. By default, one working day corresponds to 8 hours. Using the arrow to the right of Workdays, you can set whether the amount of time should be specified in workdays, hours or minutes.

3. A personal - i.e. project-independent - task must be assigned to a resource. If you do not care about the completion yourself, you can assign it to another resource. A click in the **Resource** field offers you a quick selection of frequently used project resources, a click on **Address Book** in the window that appears during resource selection opens the global address book. A task can be assigned to only one resource to ensure unambiguous responsibility.

4. You can specify in which time frame the task should be completed (start and/or end), but you don't have to.

Assigning a task to a project

By default, tasks you create in the cross-project project list are personal tasks and not assigned to any specific project. However, you can change this.

1. Click the task you want to assign to a project, and then click **Edit** on the **Start** tab of the ribbon.

2. The page panel will open. Here, under **Assignment**, click in the Assign to project field.

3. A list of all projects for which you have permissions now opens. Select the desired project and confirm with Apply.

As soon as a task has been assigned to a project, a reference to the project appears in the right-hand side panel when editing. You can click on the project name to go directly to the project. If the task has been assigned to an activity in the Gantt schedule, the activity determines the time frame (start and end) of the task. However, you can change it manually as long as it is not temporally outside the task.

Notifications and comments

Every user can define for himself in the user settings if and when he wants to be notified about an upcoming task.

1. In Outlook, click the **File** tab, then **Settings** under InLoox. The Settings window opens.

2. Now click on **Personal** in the navigation bar on the left.

3. Now you can define the frequency with which you want to receive notifications.

Important: The responsible resource will automatically receive a notification when something changes in the task.

The Notifications field is intended to notify additional people, such as the project manager. The arrow offers a resource quick selection, a click on the three dots opens the global address book.

If you want to convey more information about the task, you can add comments to the task. To do this, click on the Comments tab at the bottom of the page panel for editing the task:

You can deposit people who should be notified about new comments on the task.

1. Enter your project comment.

2. If you want to notify someone about it, click in the **Notify** field. Here you can either use quick selection to choose the resource to notify or alternatively open the global address book and find the appropriate people here.

3. Then click on Add note.

You can also create comments with notifications for tasks without project reference.

How people are notified is set by the InLoox administrator in the settings.

Marking tasks as done

You can mark completed tasks as done directly in the task list. There are several ways to do this:

- If you have the Completed column (with the green checkmark) in your task list, you can mark the task as done by clicking on the checkbox.
- Alternatively, you can also right-click on the task in your task list and select Mark as Done in the context menu. For project-related tasks, you can distinguish whether you want to mark only the task or also the task in the project plan to which the task belongs as done.
- The same function is also available in the ribbon on the **Start** tab. To do this, click on the desired task and in the ribbon on Mark as done.

Marking tasks as done has the following effects:

- When you mark a task as done, it disappears from your task list with today's overdue and open tasks and is displayed as a completed task.
- For tasks with a project reference, the completion of the task is reported back to the project and is included in the project progress calculation.
- If you have set notifications for the task, the person(s) will be notified about the completion of the task.
- If you as the project manager mark a task as completed for which you yourself are not entered as a resource, the responsible resource will be informed automatically.

Delete tasks

You can delete tasks by clicking on the corresponding task in the list and then clicking **Delete** in the ribbon on the **Start** tab. This function is also available in the context menu, which you can reach by right-clicking on the task you want to delete.

When you delete a task, the people for whom you have set up notifications will be informed about it. If you, as a project manager, delete a task for which another resource is responsible, then that resource will be notified about it.

Note: The deleted tasks are irrevocably removed, you cannot restore them.

Tip: If you want to delete several tasks at once, you can do it with Multiselect. To do this, hold down the CTRL key on your keyboard and left-click on the tasks you want to delete. Now select Delete in the ribbon.

Filter options

In order to be able to edit the task list in a more targeted way and to better find your way through a large number of tasks, InLoox offers you various filter options.

When you move the cursor over a column heading in the task list, a small filter icon appears in the field. Click it to filter according to the respective category.

For example, if you want to see only your own tasks, click the filter icon in the Resource column heading. A box will open where you can put a check next to your name. You can also set several checkmarks at the same time. The filter will be applied to the project list accordingly.

To remove the filter, click again on the filter icon in the column header. In the window that opens, select Delete filter.

Analytical filter

In addition to the filtering options mentioned above, advanced filtering options are available via the analytical filter. The analytical filter can be found on the **Start** tab in the **View** section under **Filter.**

Customize the list view

To customize your list in the way that makes the most sense for the way you work, there are several functions available:

Add and remove fields

The task list offers you a variety of information that you can add or remove from the list in the form of table columns.

To do this, click the right mouse button in the header and click **Column selection** in the context menu that opens. If you want to add one of the fields to your list, place a check mark at the respective position in the newly appeared window with the possible columns.

Group

To group the tasks according to a certain criterion, drag the field you want to group by into the Grouping field above the column headers.

If you click on the arrow next to the grouping criterion, you can decide whether to sort in ascending or descending order.

Here, too, there is another filter option: If you move the mouse over the grouping criterion, a small filter symbol will appear. If you click on it, you can further narrow down the grouping criterion.

Sort

You can additionally sort the task list by clicking on the column header you want to sort by. Click again, then the sort order will change.

Conditional formatting

You can also format the task list according to rules you define using Conditional Formatting. You can find this feature on the **Start** tab in the **View** section. How to best work with conditional formatting is explained in detail in the Conditional Formatting chapter.

Save and re-use views

When you have compiled your task list in the way that is most useful to you, you can save this view to the database and make it available to other users.

To do this, click **Save as new** view on the **View** tab. Now you can give the current view a name. You can also decide whether this view should be available to all InLoox users or only to you.

The saved view is available in the Outlook folder area on the left side under Tasks.

Adjustments to your default task list are automatically saved locally on your computer and are available to you automatically the next time you use the task list. Only changes to additional views need to be saved separately.

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 many projects are created in InLoox, then new tasks are created permanently and existing tasks are modified or even deleted.

To always be up to date, you can update the task list manually by clicking **Refresh** on the Start tab in the ribbon.

Task list in the outlook side panel

To have an even better overview of your InLoox tasks while working in Outlook or in the cross-project areas of InLoox, you can also display the task overview in a side panel to the right of any Outlook view.

To show the side panel, click the **InLoox** tab, then **Task List**. To hide it again, you can go the same way or click the small cross at the top right of the page panel.

Click anywhere in the side panel to activate the Tasks tab, where you will find all the functions you know from the cross-project task list in full-screen mode.

Please read the Global Task View chapter to learn how to use these functions and how to customize the contents of the task list.

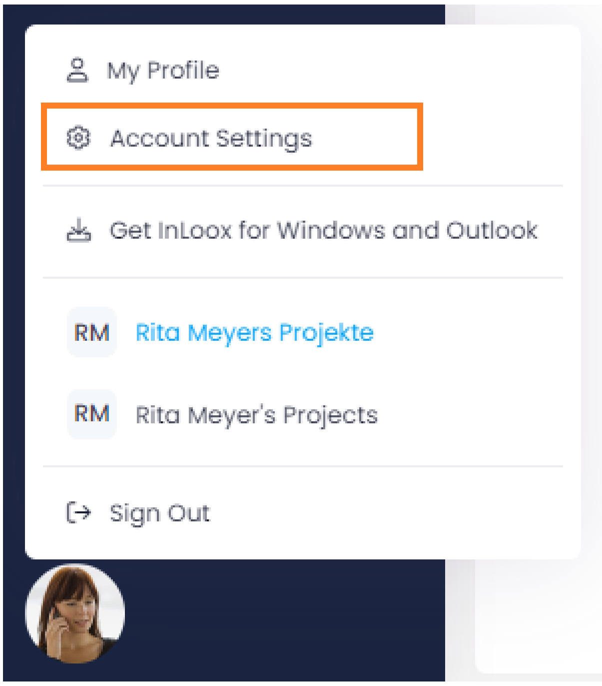
InLoox settings

Since InLoox v11.0, the InLoox settings can only be accessed in InLoox Web App

PLEASE NOTE Administrator permission

To access the InLoox settings, you need administrator permissions for your InLoox account. Users without administrator permissions can only access the personal settings for notifications and the view mode of InLoox Web App.

1. In **InLoox Web App**, click on your profile picture in the bottom left corner.
2. Now click on **Account Settings**.



Now you can define the general settings for the entire InLoox account.

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.

Install InLoox On-Prem

IMPORTANT Please note that Outlook must already be installed and fully operational before you can install InLoox On-Prem. The installation usually takes no longer than five minutes per client.

For the installation of InLoox On-Prem, a step-by-step guide in our Whitepaper InLoox 11 Server Installation will help you.

TIP In our Support center you will find assistance in solving installation problems.

Functionalities of InLoox for Outlook Modern Add-in

Set up the *InLoox for Outlook* add-in

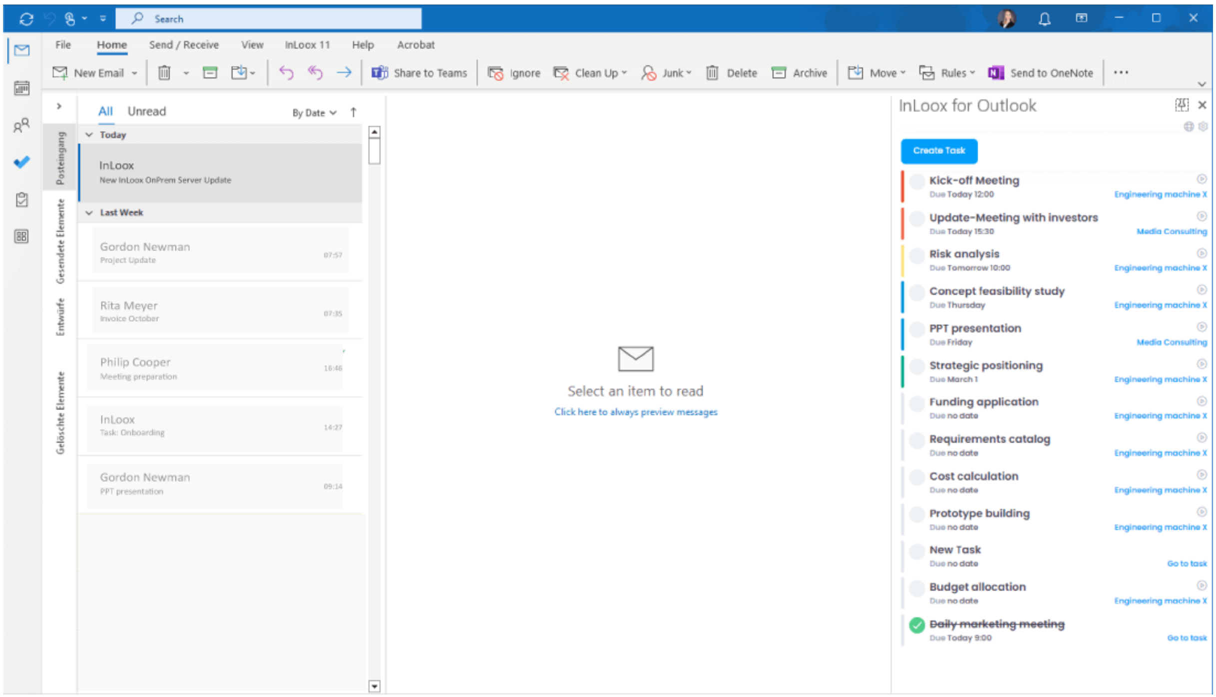
There are different ways to load the add-in into your Outlook. Please refer to the installation guide.

First steps in the *InLoox for Outlook* add-in:

1. Click on **Open InLoox Add-in** in the Outlook menu at the top. The InLoox for Outlook side panel opens.
2. You can **pin** the side panel so that it is always available.
3. **Log in** to your InLoox account. Do this as usual, either with the e-mail/password combination or via your Microsoft 365 access, depending on the setting you have chosen.
4. That's it! You can now see your data with your current and upcoming tasks in the side panel.

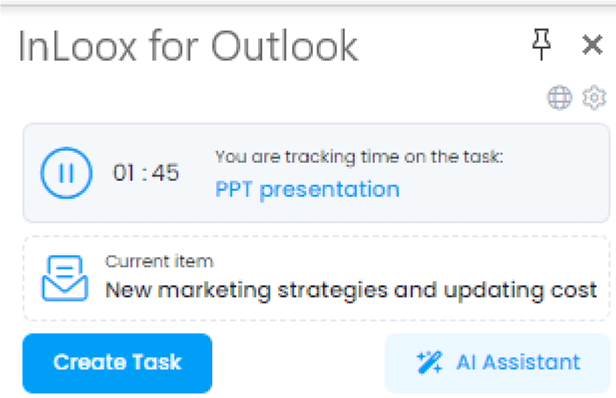
Structure of the *InLoox for Outlook* add-in

The InLoox for Outlook add-in equips your Outlook with a **side panel**.



This side panel serves as your personal **workspace**, providing you with a comprehensive overview of your **current and upcoming tasks**. The tasks are **sorted according to their due date** so that you can easily see which tasks have priority.

At the top, you can also see which e-mail is currently selected and whether you are currently tracking the time for a task using the stopwatch.



You will see two small icons at the top right:

- **Globe icon:** This opens the InLoox web app in the browser.
- **Gear icon:** This takes you to your profile, the account settings, you can invite users and switch between accounts if required.

Create, edit and complete tasks

Create new tasks

You have several options for creating tasks:

1. Direct creation of a new task without e-mail reference:

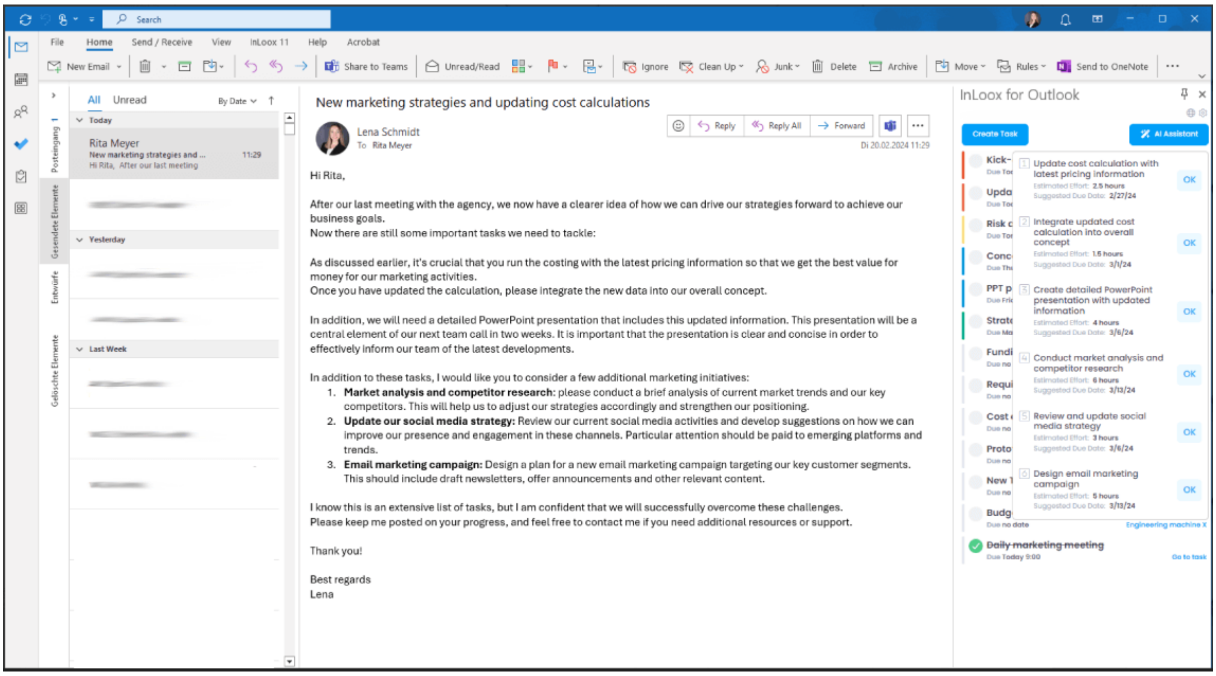
- In the side panel, you will find an empty field directly above the task list. To create a new task without referencing an email, simply type the name of the new task into this field.
- Then click on the blue button with the tick to the right of it to create the task.
- You can now open and [edit the new task](#) in the task list.

2. Creation of new task based on a selected email:

- Select the email that is to serve as the basis for the new task. **Info** This is displayed in the side panel under "Current item".
- To create the task, click on the blue button with the tick directly to the right of the "Current item".
- A task is created with the subject of the email as the task name. The content of the e-mail is automatically transferred to the task description. You can also recognize the connection of the e-mail to a task by the marking of the e-mail with the **category "InLoox"**.

3. Suggestions for tasks by the InLoox AI Assistant:

- The InLoox AI assistant can be used for emails that potentially contain several tasks. To do this, select the relevant email from which you would like to receive task suggestions.
- Click on the button **AI Assistant**. You will then be given suggestions for possible tasks, including an estimated effort and a recommended due date. To accept a suggestion, click on the **OK** button next to the suggestion.
- You will now find the task in the task list and can edit it with a click.



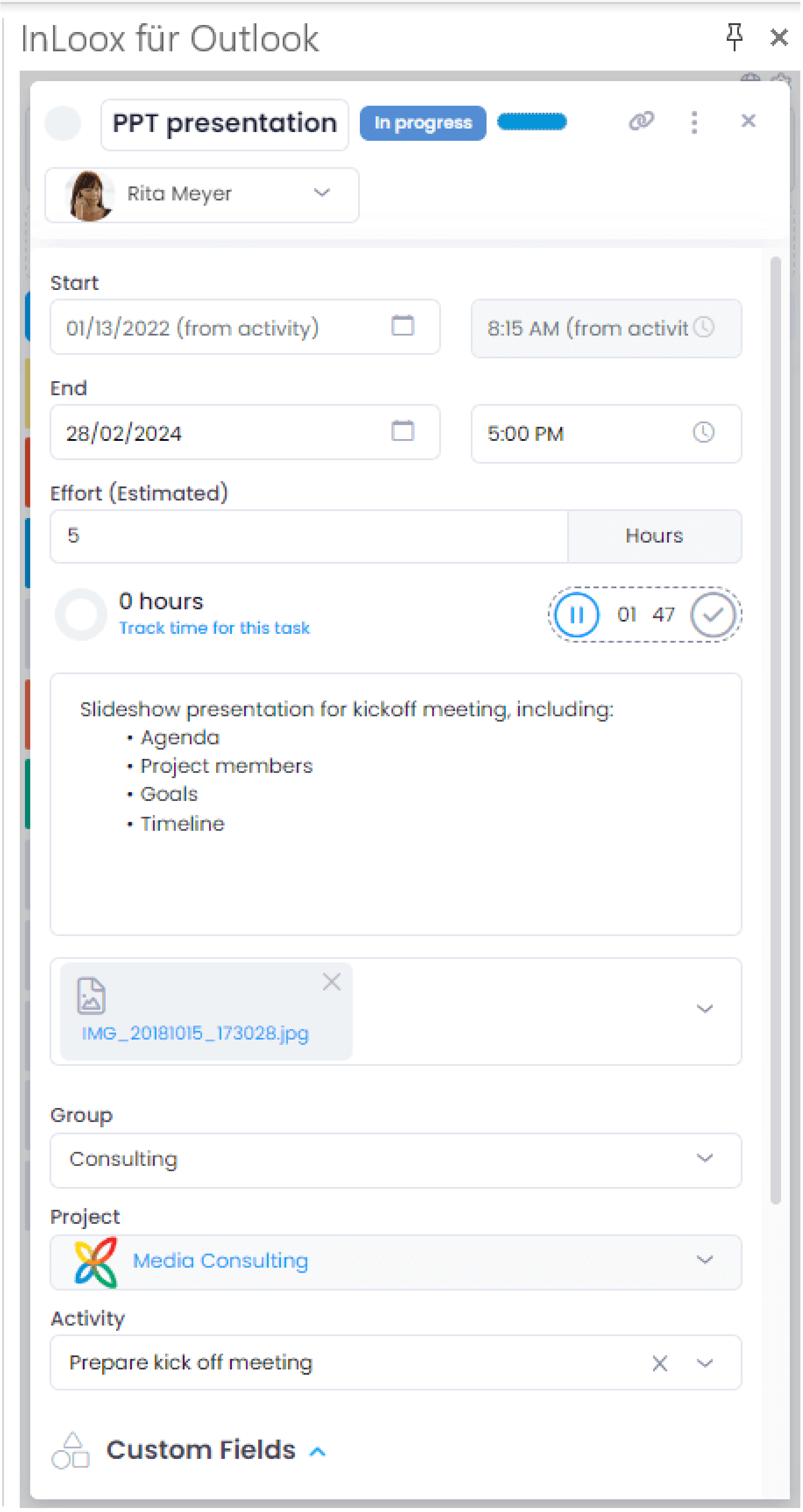
Edit tasks

Here you can find out how to edit tasks efficiently:

1. Open a task: Click on the task in the task list that you want to edit. This opens the task detail view.

2. Edit the task: In the opened view, you can edit the task as usual. All functionalities that are also offered in the InLoox Web App are available to you. The editing options include, for example:

- **Adjusting the start and end date:** Define the time frame of the task by adjusting the start and end date according to your planning.
- **Enter an estimated effort:** Estimate the effort required to complete the task and enter it.
- **Add a description:** Provide the task with a detailed description to clearly communicate the context and subtasks.
- **Project assignment:** Select the project to which the task belongs.
- **Comments:** Leave comments on the task to share additional information or facilitate communication with the team.



Info For detailed information on project-related tasks, we recommend the [help article Edit Tasks »]

Check off completed tasks

Checking off completed tasks is a central component of task management. It allows you to keep track of completed and outstanding tasks. You have various options for marking tasks as completed:

1. Check off directly in the task detail view:

- Open the task you want to mark as completed by clicking on it.
- Within the task details, you can mark the task as completed as usual by clicking on the white round circle next to the task name.

2. Check off in the task list:

- You can quickly mark a task as completed directly in the task list by clicking on the white round circle to the left of the task name. It is not necessary to open the task beforehand.
- After clicking, the circle is marked with a green tick and the task is completed.

Info Completed tasks are shown crossed out at the end of the task list. This gives you a clear overview of the tasks you have completed on the current day.

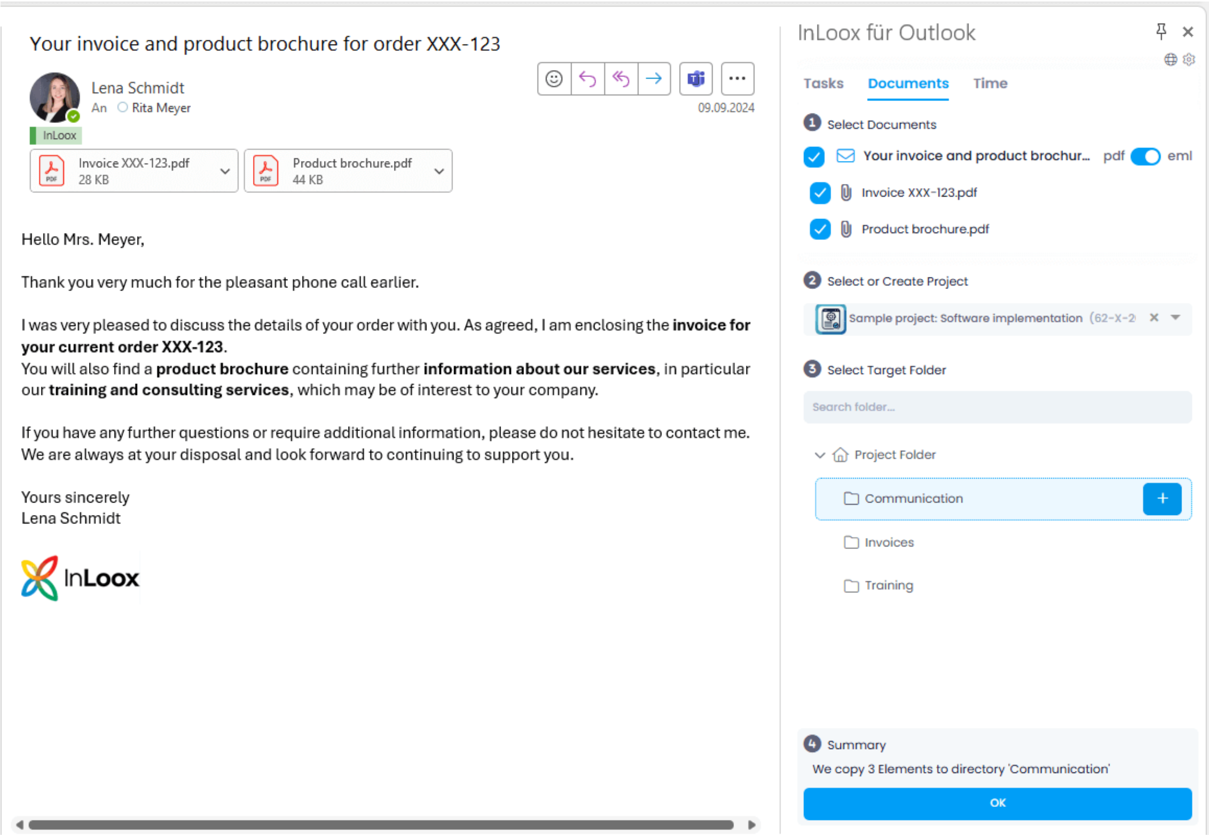
Document management

Save emails and attachments in projects

PLEASE NOTE Since InLoox 11.17, you can chose to save emails as .eml-files. This will also save attachments as they are in the .eml-file.

If you would like to save your emails and/or email attachments in your InLoox projects, proceed as follows:

1. Navigate to the **Documents** tab in the InLoox for Outlook side panel.
2. Select **which documents** you would like to save, e.g. the **entire email (in PDF format or eml-format)** or only **individual** or **all email attachments**.
3. Select an existing **project** in which the documents are to be stored. Alternatively, you can also create a new project.
4. Select the **target folder**. You can also use the search function or create a new folder.
5. Click on **OK**. A **progress bar** is displayed at the bottom of the screen showing the upload status of your documents.



Save email attachments in tasks

You can also store your email attachments directly in a specific task:

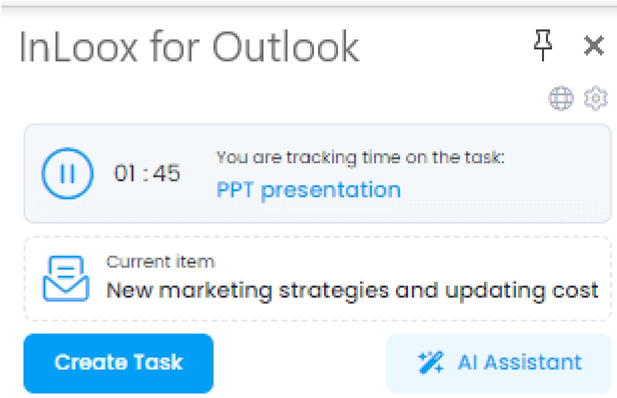
1. **Open the task** in which you want to save the document.
2. Now you can **drag and drop the document onto the task.** It is then saved there.

Time tracking of tasks

If you want to track the time of tasks, you have various options for doing so:

1. Using the stopwatch in the task overview:

- You do not need to open a task to start the stopwatch. In the side panel, there is a **play button next to each task in the task list,** which you can use to start and pause the stopwatch at any time.
- **Info** The top edge of the side panel shows if the time is currently being recorded and for which task.



- To book the recorded time on a project, open the task and confirm the time recording by clicking on the tick next to the stopwatch.

2. Using the stopwatch within a task:

- You can also use the stopwatch within the task. Open the task and start the time recording by clicking on the **play symbol of the stopwatch**.
- The stopwatch can be paused and restarted at any time.
- To record the recorded time, confirm the time recording by clicking on the tick next to the stopwatch.

3. Creation of a classical time tracking entry:

- You can also create a time entry manually without a stopwatch. To do this, first open the relevant task by clicking on it.
- Then select the option **Track time for this task** by clicking on the corresponding blue text.
- A window opens with the newly created time entry, which you can adjust if necessary.

Time tracking of Outlook elements (mails & calendar appointments)

In the InLoox for Outlook Modern Add-in, switch to the **Time** tab.

There you can:

- A: Track time from mails (**New** since InLoox 11.18)
- B: Track time from calendar appointments (since InLoox 11.13)

A: Track time from mails

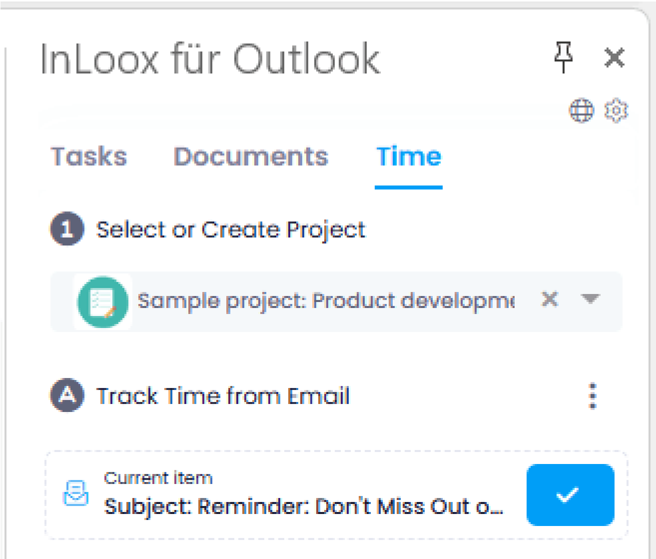
1. In the InLoox for Outlook Modern Add-in, switch to the **Time** tab.

2. In the side panel, select the **project** to which you want to track time for an email.

3 .Then, in Outlook, select the **email** you want to track time for.

4. In the side panel under *A: Track time from email*, click the button with the **blue check mark** next to the selected email to create the time entry.

Note By default, the email subject is used for the time entry. Via the **three-dot menu**, you can also **include the email body** using the slider. There you can also decide whether a **category** should be set for a booked email.



5. The time entry for the email will open, and you can enter the details such as **duration**, etc.

6. Done! The time has been tracked.

B: Track time from calendar appointments

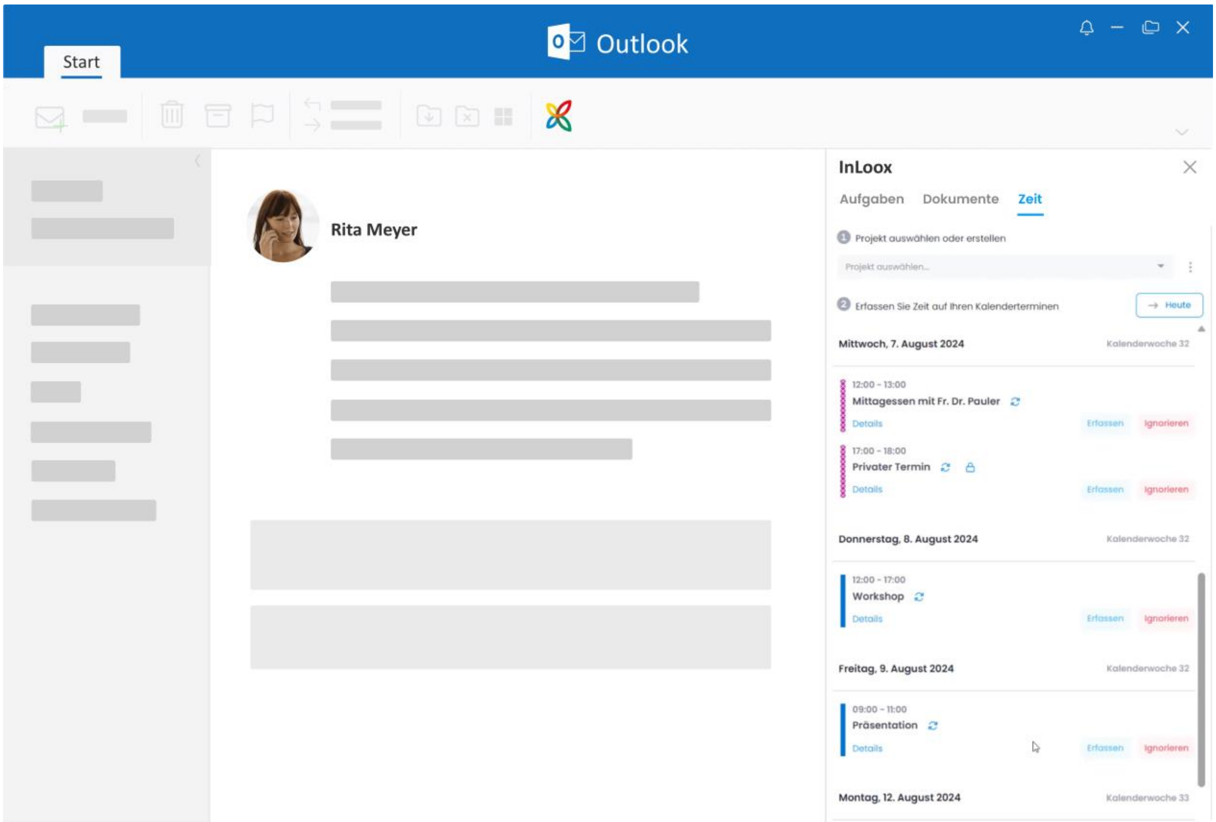
1. In the InLoox for Outlook Modern Add-in, switch to the **Time** tab.

2. In the side panel, select the **project** to which you want to track time for an email.

3. Under *B: Track time from appointment* you can **view your Outlook calendar appointments**, **navigate up and down in time** with the scroll wheel, open the appointment via the **details** or **join** directly an online appointments with a meeting link. The prerequisite to see your Outlook calendar appointments is that you grant the "Calendar-Read" permission to view your calendar.

4. Create a time entry from an appointment by clicking on the **Track** button next to the appointment. If required, you can **adjust the details** such as the duration of the appointment in order to track the time spent per project precisely.

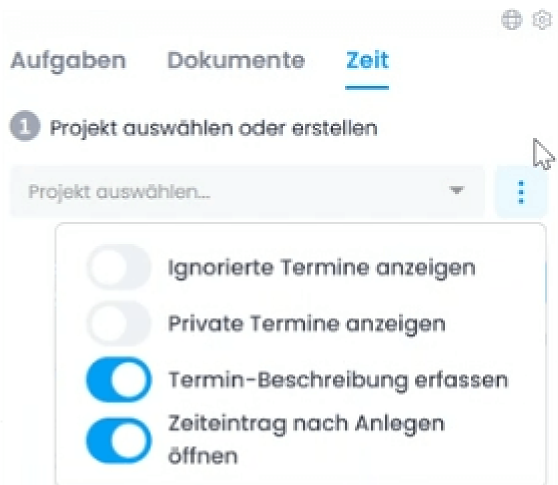
5. Done! The time has been booked - the calendar entry is therefore marked as *Tracked*.



Tips:

Private appointments or appointments that are not to be billed can be ignored. To do this, simply click on the **Ignore** button next to the relevant appointment.

By clicking on the **three-dot menu** to the right of the project selection, you can make some **general settings.**



This includes:

- Show ignored appointments
- Show private appointments
- Include appointment body (this allows you to define whether the entire description of the appointment should be included in the time tracking entry or not)

- Open time entry when tracked

Create new project

If you want to create a new project, you can do this directly from within a task. To do this, proceed as follows:

1. Either create a new task or open an existing task.
Note It is important that the task is not yet assigned to an existing project (or that you remove the project assignment).

2. Open this task and navigate to the **Project** field. Enter the **name of the project** that you would like to create. The system compares the name with the existing database - if the name entered is not found, the option *Create new project* appears. By confirming with **Enter**, the new project is created under the name entered.

3. To specify further details about the project, please go the the *Manage* page of the project in InLoox Web App.

Info The original task is automatically transferred to the Kanban board of the newly created project.

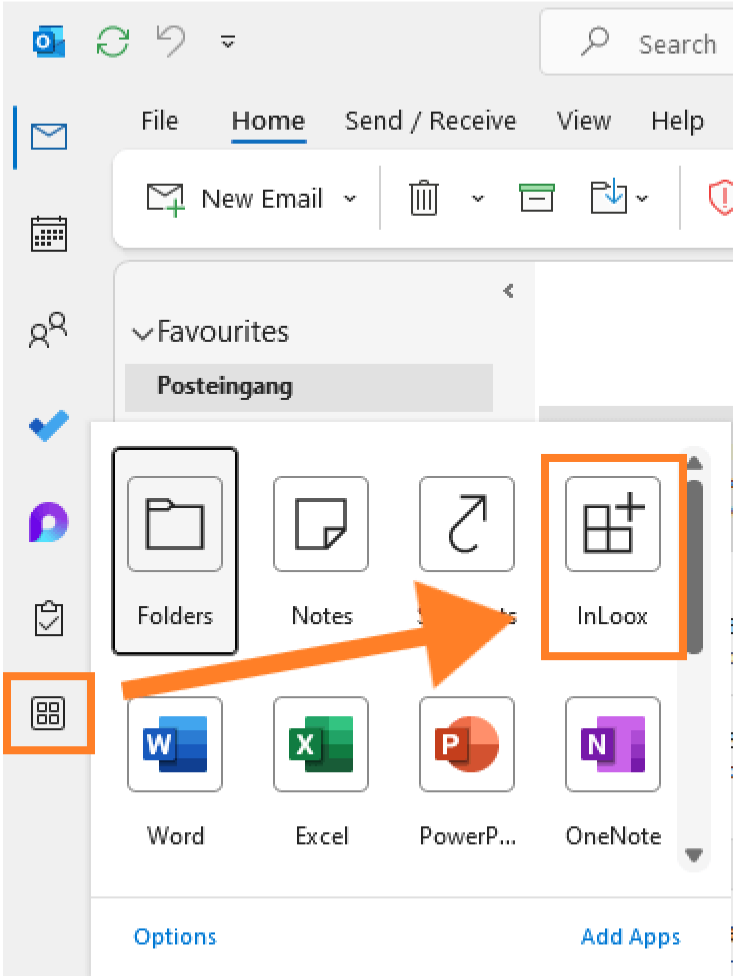
Module extension - InLoox Web App interface in Outlook

With the module extension of the Modern Add-in, you can access since version 11.14 all functionalities of the InLoox Web App directly in Outlook.

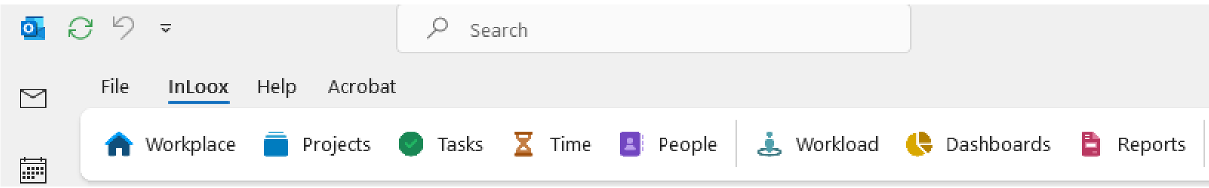
How to open the module extension:

1. Open Outlook.

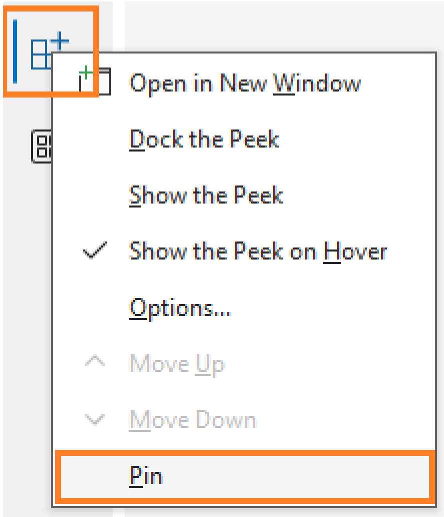
2. Click on the **bottom icon** in the **horizontal menu bar on the left**, which stands for **More apps**. Then select **InLoox**.



3. The “InLoox” tab opens in Outlook. There you have access to the areas **Workplace, Projects, Tasks, Time, People, Workload, Dashboards** and **Reports**.



4. **Tip** Pin the InLoox module extension in the left sidebar by **right-clicking** and and clicking on **Pin** in order to open the module extension quickly and conveniently.



For detailed instructions of the functionalities, please read the online help for InLoox Web App.

Lists

Create and edit a to-do list

You can use the lists to create checklists for your project and thus clearly structure project information even in an early phase without tasks and scheduling.

You can only create lists on a project-specific basis, i.e. within a project.

Create a checklist in a project

1. Open the project to which you want to add the list.

2. In the project, click **Lists** on the **Start** tab in the ribbon.

3. On the **Edit** tab, click **New List**.

4. In the dialog box on the right, you can now assign a name for your checklist. If you want to create a personal checklist with your own To Dos, check the box **Only visible to me**. If you have set the checkmark, other team members will not see the list.

Adjust and add columns/fields

In the **Fields** section, you can now assemble your list from various field types. The following types of fields are available:

- Text
- Date
- Integer
- Decimal number

- Control field

By clicking **New field** you can add another field to your list and name it as you wish.

With the help of the arrows you can change the arrangement of the fields in the list, with a click on the cross you can delete a field from the list.

Create links to other project elements

Click **New link** in the page panel on the right if you want to link your list with one of the following elements from your project:

- Mindmap Node
- Tasks
- Planning elements in the Gantt chart
- Time tracking items
- Documents
- Budgets
- Budget items

Click on the corresponding link to navigate directly to the linked element, e.g. to a mind map node to which the list belongs.

Add list items to the checklist

Now fill your list with content by adding list items. To do this, click **New Entry** on the **Edit** tab in the ribbon. You can type text directly into the line in the list.

Example: You can create a classic checklist with the two field types Checkbox and Text.

Example: You create a date list from the fields Date and Text.

Adjust the view

On the **View** tab, you can switch between a map and list view. These views only affect the appearance of your list, not the contents.

Switch between different lists

On the tabs at the bottom left you can see all the lists that have already been created for the project. You can navigate from list to list there. You can add as many lists as you like to a project. Clicking the right mouse button opens a context menu that allows you to create new lists and edit or delete existing lists.

You can also click **Edit List** on the **Edit** tab in the ribbon if you want to make changes to the list you are currently on.

Create a list template

InLoox allows you to create templates for checklists that are relevant in different projects.

To do this, first create a checklist that you want to use multiple times in a project of your choice.

Save template

Save the list by clicking **Save Template** on the **Templates** tab.

Assign a name for the list and confirm with OK.

The list is then available in the **Templates** tab.

Export template

To export the list as a template, click **Export Template** under the **Templates** tab.

You can save the list for further use in InLoox as an InLoox list file or as a CSV or XML file on your computer or file server.

Import template

To use the list template in another project, open the corresponding project, click **Lists** under the Home tab, then click the **Templates** tab.

Then click the **Import Templates** button and select the appropriate list template from your computer or file server.

Mind Maps

Visually collect and organize your ideas in mind maps with so called nodes.

Thereby you get an overview over all ideas, concepts and drafts.

Create a mind map

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).

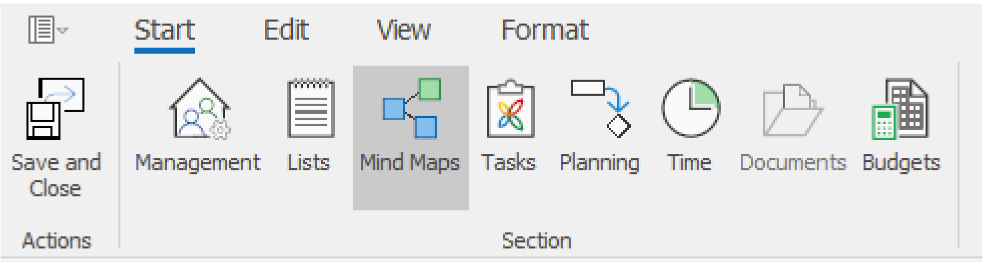
How to create a task-based mind map

Visually collect and organize your ideas in mind maps with so called nodes. Thereby 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.

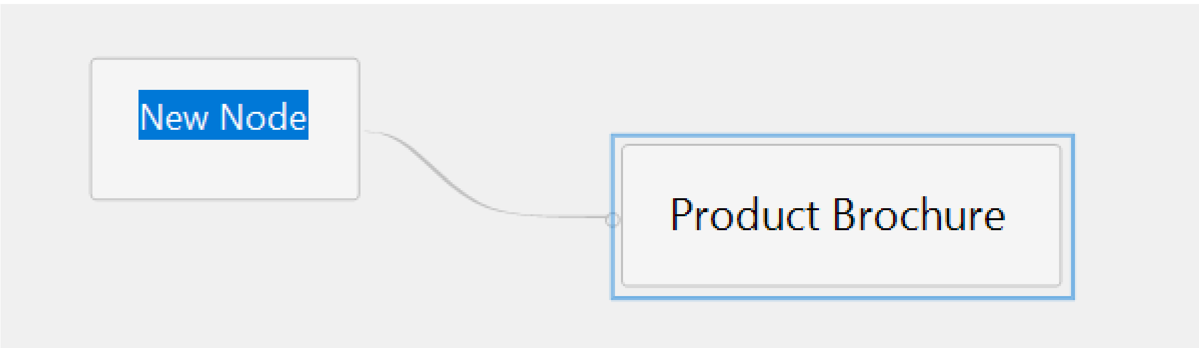
1. Open an existing project or create a new one.

2. To create a new mind map click on **Mind Maps** on the **Start** tab.



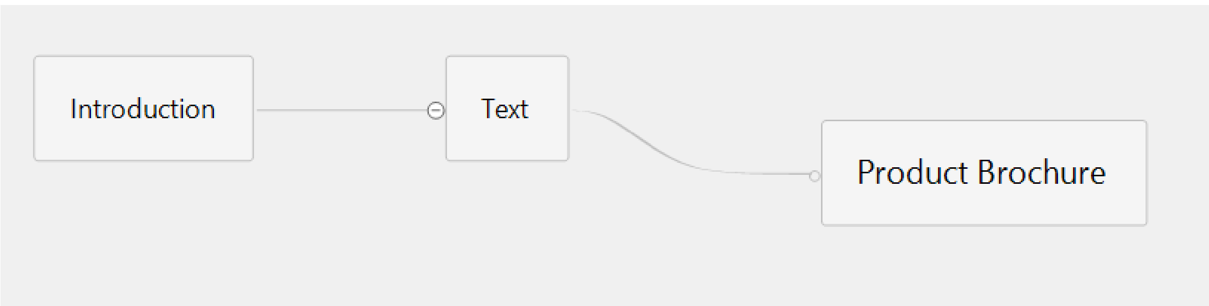
3. The main node is automatically located in the center of a new mind map. By default, it corresponds to the name of the project. Simply click the node to rename it.

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.



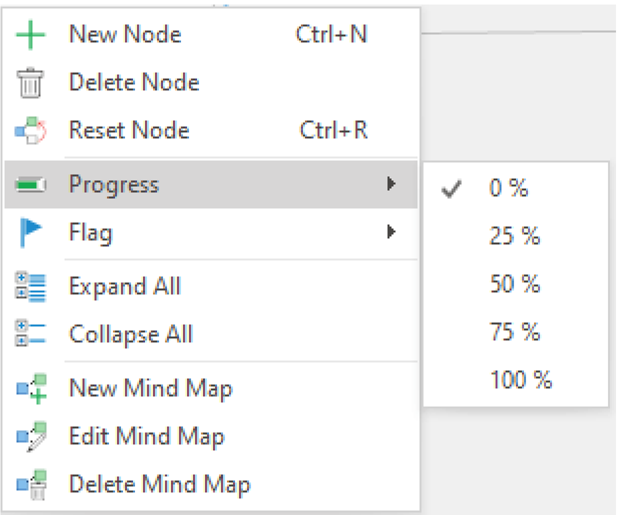
5. By default a new node is created as a sub-node of the marked node. Name the node and push enter.

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.

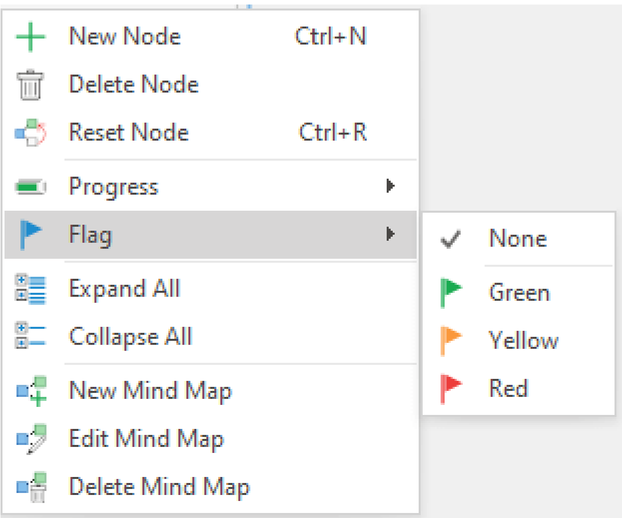


7. To edit a node, right-click on it and enter additional information.

- **Progress**: Enter the progress as a percentage.



- **Flag**: Mark the node with a flag.



Alternatively, you can also use the side panel on the right side. Here, in addition to progress and flagging, you can also link documents and resources to the node and enter a detailed description.

8. Create as many nodes as needed and position them by drag-and-drop.

9. Format the mind map and edit the background color of a node or add a symbol to it.

10. When you are finished you can create tasks from the mind map. Therefore see the chapter: Create tasks from a mind map.

Create another mind map

To create another mind map in the same project, right-click and choose **New Mindmap**, or click on the mind map symbol in the lower menu bar, or use the keyboard shortcut **Ctrl+M**.

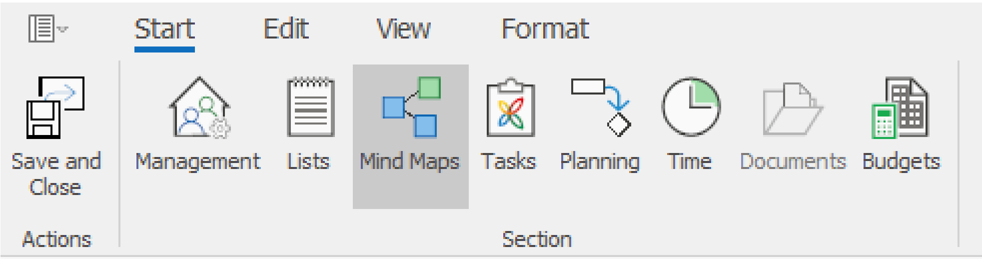
How to create a plan-based mind map

Visually collect and organize your ideas in mind maps with so called nodes. Thereby 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).

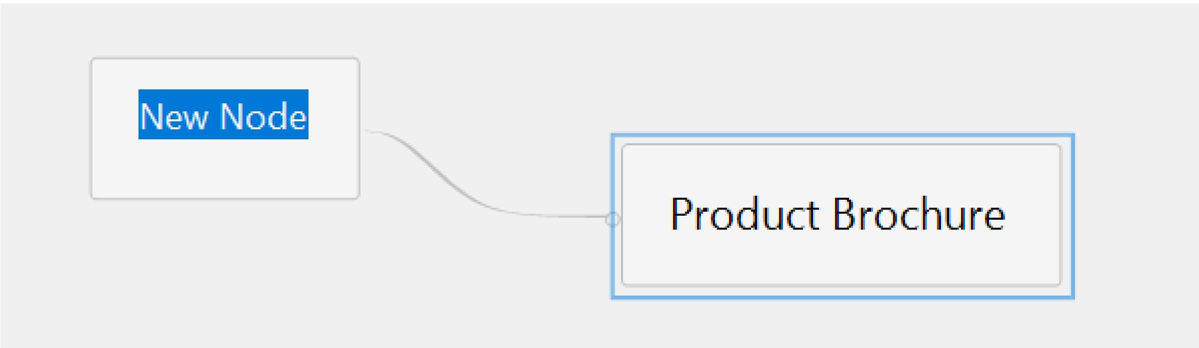
1. Open an existing project or create a new one.

2. To create a new mind map click on **Mind Maps** on the **Start** tab.



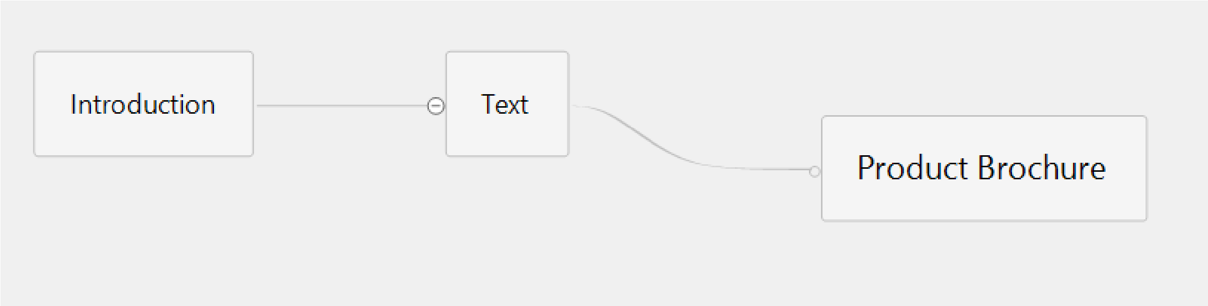
3. The main node is automatically located in the center of a new mind map. By default, it corresponds to the name of the project. Simply click the node to rename it.

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.



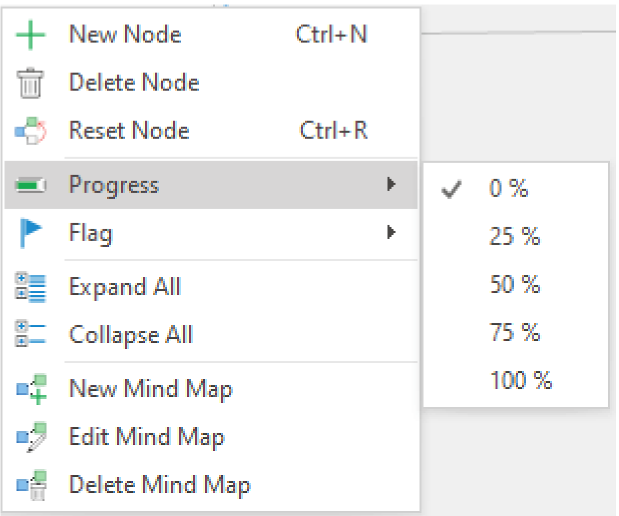
5. By default a new node is created as a sub-node of the marked node. Name the node and push enter.

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.

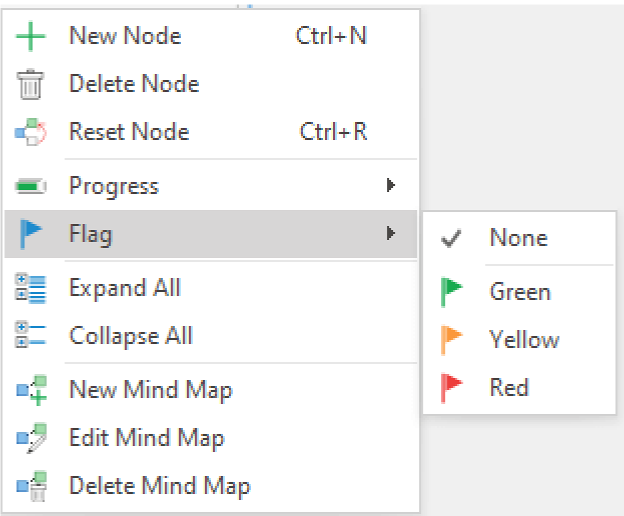


7. To edit a node, right-click on it and enter additional information.

- **Progress**: Enter the progress as a percentage.



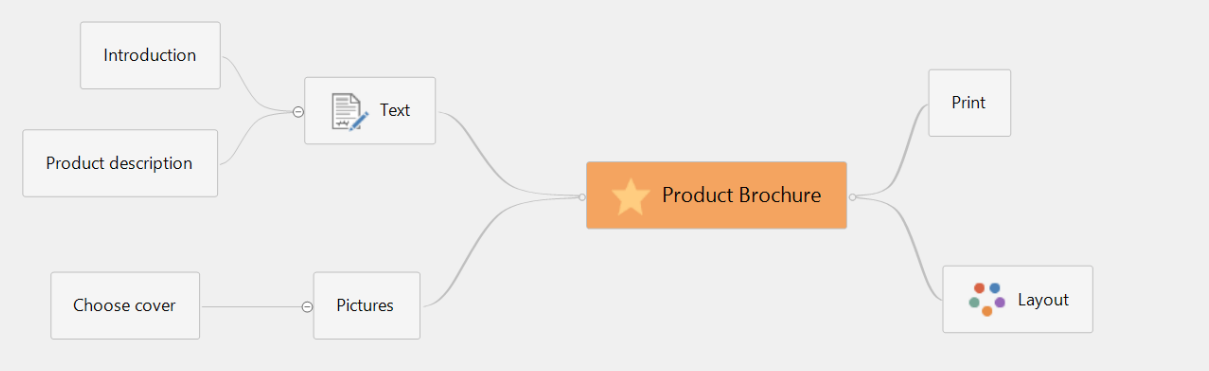
- **Flag**: Mark the node with a flag.



Alternatively, you can also use the side panel on the right side. Here, in addition to progress and flagging, you can also link documents and resources to the node and enter a detailed description.

8. Create as many nodes as needed and position them by drag-and-drop.

9. 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*.



10. When you are finished you can copy the mind map to the planning. Therefore see the following chapter: *Copy a mindmap to the planning*

Create another mind map

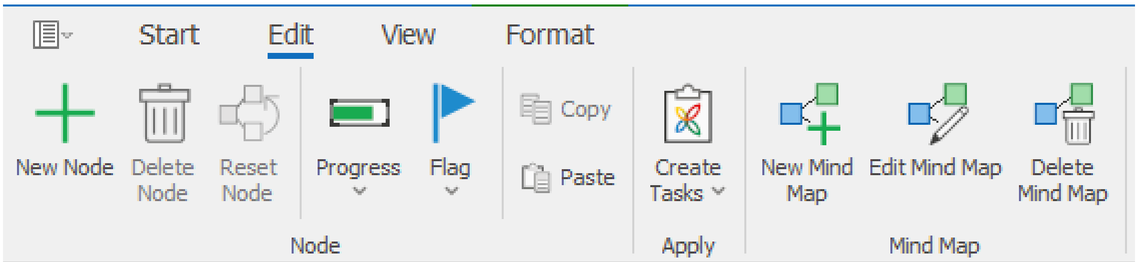
To create another mind map in the same project, right-click and choose **New Mindmap**, or click on the mind map symbol in the lower menu bar, or use the keyboard shortcut **Ctrl+M**.

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:

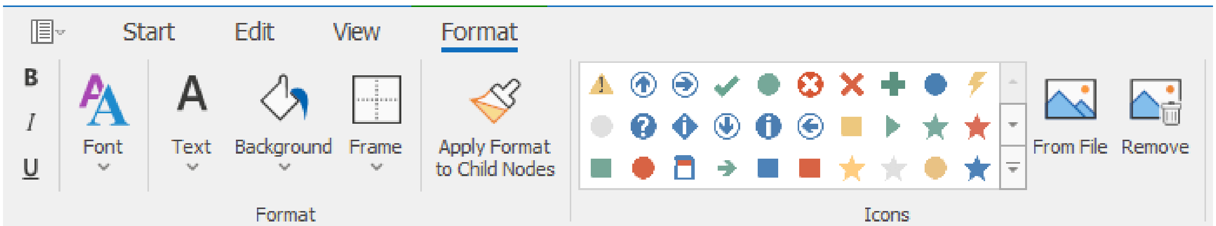
Features on the Edit tab



- **Reset Node:** Remove a node after drag-and-drop to its initial location.
- **Progress**: Express the progress of a selected node as a percentage.
- **Flag**: Highlight a selected node with a colored flag.
- **Create Tasks**: Create tasks from either All Nodes, End Nodes, or Selected Nodes.

TIP For more information on how to copy a mind map to the planning see *Copy mind map to the planning* and on how to create tasks in a mind map see *Create tasks from a mind map*.

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:

- **Apply Format to Child Nodes**: Apply the format of a selected main node to its child nodes.
- **Icons**: Highlight selected nodes with symbols.
- **From File & Remove**: Add or delete a picture to/from a node.

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**. This means the main nodes of your mind map correspond with the tasks of the project (Bottom-Up).

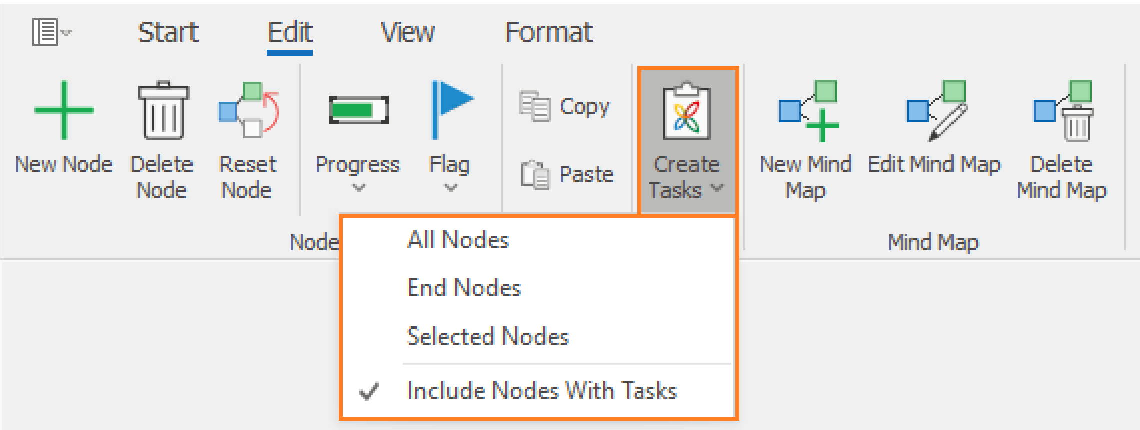
For more information on the task-based approach see: *How to create a task-based mind map*.

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. The Mind map is opened now. Click on **Create Tasks** and choose which nodes you want to transform into tasks.

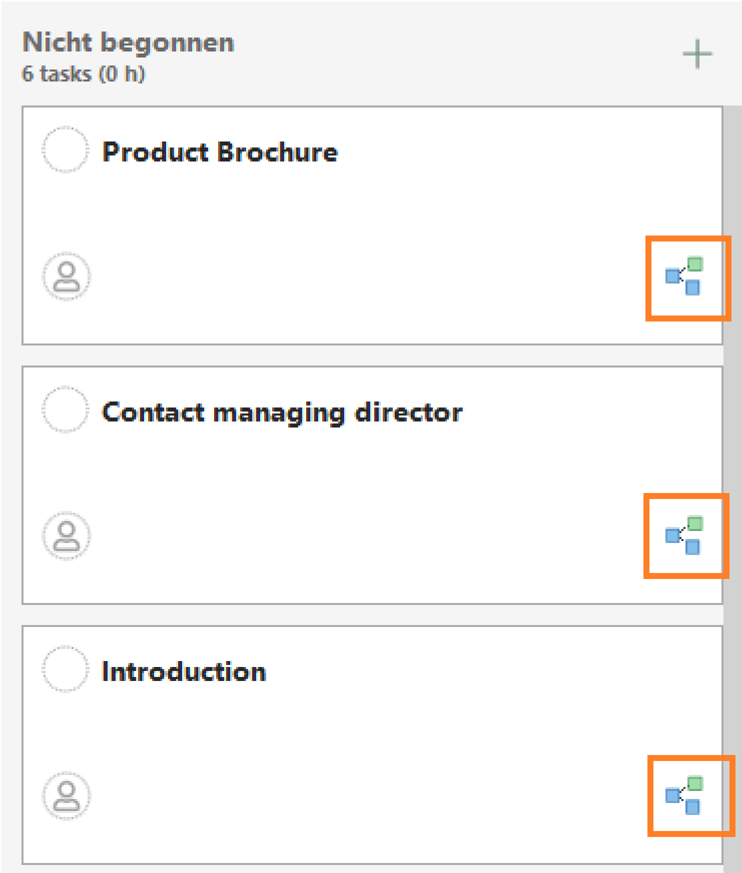


You have the following possibilities:

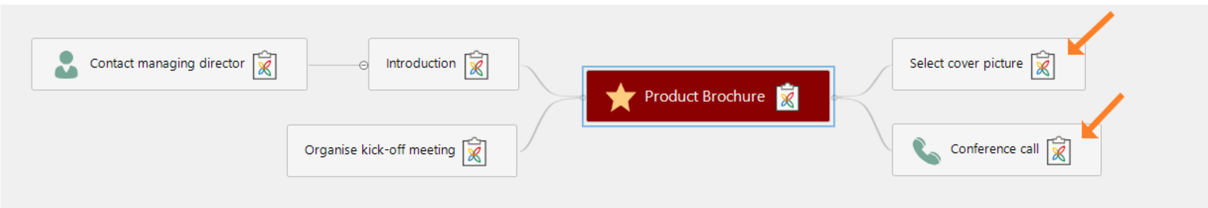
- **All Nodes:** All nodes of the mind map including the main node are transformed into tasks. The tasks are automatically transferred to the task area of your project.
- **End Nodes:** Only the end nodes of your mind map are transformed into tasks. Those can be accessed in the task area of your project 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.

After you have selected an option, the tasks are automatically created from the nodes.

4. In the task list/the Kanban board, you can find all the tasks that have been transferred from the mind map. They are marked with a mind map symbol.



5. In the mind map all nodes that already have been transformed into tasks are marked with a task symbol.



TIP For more information on how to add important information to tasks, see *Create and edit tasks*.

Copy 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).

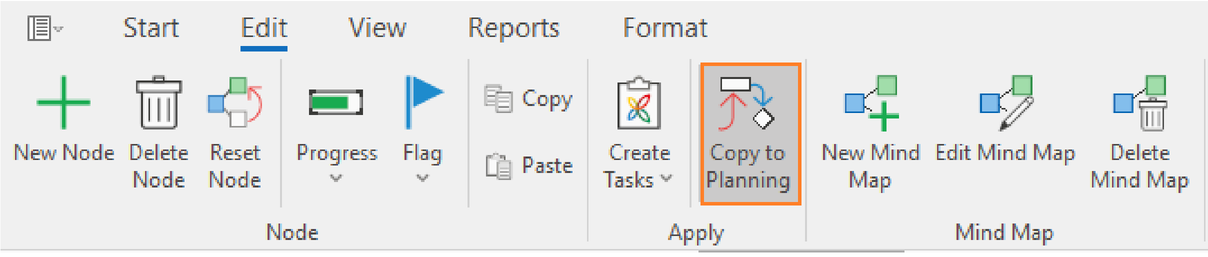
For more information on the plan-based approach see: *How to create a plan-based Mind Map*

Proceed as follows:

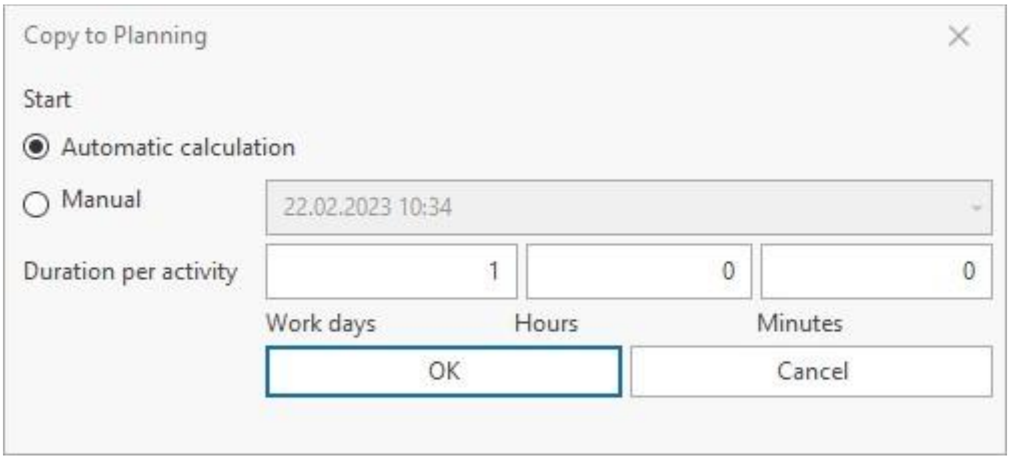
1. Open an existing project or create a new one.

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.



- Start: Choose between **Automatic calculation** and **Manual calculation** to define the start date for the planning. For the manual calculation enter an individual start date.
- Duration: 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.

Tip 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.

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.

3. Choose one of the following formats in the drop-down-list:

- **InLoox Mind Map File**

- **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 vectorgraphic.

Tip To learn how to 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*

How to open a mind map template from your computer

1. Open an existing mind map.

2. Click on **Import Template** on the **Template** tab, to load an existing mind map from your computer. In the drop-down-list choose **InLoox Mind Map Template** and then select the template from your computer.

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.

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 get to the project list, click on the InLoox tab, then click on Projects in the Outlook Ribbon.

1. Functions in the InLoox Ribbon

On the Start tab, in the InLoox Ribbon, you can find additional functions that make your work in the project list easier.

Administrators can define the categories as well as the different statuses individually in the InLoox settings.

2. Open or create a project

Open project

Double-click the desired project in the project list. Or right-click on the project to open the context menu and select Open project.

Create project

Right-click the project to open the context menu and select New Project. Alternatively, you can select New Project under the Start tab.

3. The context menu and helpful shortcuts

The context menu offers almost all functions that are also available in the InLoox Ribbon. To open the context menu, right-click in the project list.

For more information on how to structure the project list, see Create a view.

Helpful keyboard shortcuts

- F5 - refresh the project list.
- CTRL+P - Print the project list.
- CTRL+C - Copy a project to the clipboard.
- CTRL+V - Paste a project from the clipboard to the project list.

Conditional formatting as a warning system

Define conditions for important project information or key figures so that the respective field or row is highlighted (e.g. colored) when the condition occurs. This function is particularly suitable for:

- Project controlling as an early warning system for critical projects.
- For optimal structuring of the project list

Add Simple Formatting

Simple formatting compares the value of a field with a stored reference value (condition). In the following example, we want to add a red background to the projects in the project list whose actual expenses are above a given value.

1. We start from the project list. On the **Start** tab, click **Conditional formatting**.
2. The Format Rule Manager opens. Here you can set a new rule for formatting your project list on the **New Rule** button.
3. Clicking on **New Rule** opens another window called **New Formatting Rule**. Here, select **Format only cells that contain this** as the rule type.

4. In the rule description, select whether you want to format according to a specific **cell value** or data within a specific range. For our example, we will choose the first option **Cell Value**.
5. In the drop-down menu of the field to the right of it, specify the condition. For our example, we choose **Greater than**. Another field appears in which you can enter the corresponding reference value, for our example, 5000.
6. In the **Format** area, you define, among other things, with which color the cell/row should be filled, e.g. red.
7. Once you have completely defined your formatting rule, confirm it by clicking **OK**.
8. You are now back in the Format Rule Manager. Here you will find checkboxes to apply the rule formatting to the entire line and to stop the rule. Here you can also select the category to which the rule is to be applied. For our example, select **Total Expenses (ACTUAL)**.

Advanced Formatting

Advanced formatting allows the mathematical calculation of a value, which can then be compared with a reference value. Several fields can serve as variables for such a calculation. In the following example, we will check whether the actual expenses of a project exceed the planned expenses.

1. We start from the project list. On the **Start** tab, click **Conditional Formatting**.
2. The Format Rule Manager opens. Here you can specify a new rule for formatting your project list on the **New Rule** button.
3. Clicking **New Rule** opens another window called **New Formatting Rule**. Here, select **Use a formula to determine the cells to format** as the rule type.
4. In the editing of the rule description you can create the desired conditions and link them using the operators "and", "or", "not and" and "not or".
5. Add a new condition on +. For our example, first select **Sum expenses (ACTUAL)**. For the comparison operator, select **greater than**. As the comparison object, again select **Total Expenditures (Planned)**. By clicking on the icon in the comparison object field you can switch between self-defined values and automatically generated values of other categories.
6. As with the simple formatting, you can now define in the Page panel in the **Format** area how the projects whose actual expenses are greater than the planned ones are to be highlighted. Afterwards, confirm your new formatting rule with **OK**.
7. You are now back in the Format Rule Manager. Here you will find checkboxes to apply the rule formatting to the entire line and to stop the rule.
8. In the project list, all projects that fulfill the condition are now highlighted.

The tree structure in the project list

If you have opened the project list, you will find the tree structure on the left side of the screen (provided: Outlook folder structure is expanded on the left). This provides you with additional views, such as Favorites, Project Requests, Archive and Recycle bin.

How to duplicate a project

In the project list you can duplicate complete projects. This is very useful if you want to create a new project that is very similar to an existing project. In this chapter, we will briefly show you how to copy, paste and then edit a project.

1. Click **Projects** in the **InLoox** tab to open the project list.

2. in the project list, select the project you want to copy ...

Helpful keyboard shortcuts:

- **CTRL+C** - copy the selected project.
- **CTRL+V** - paste the selected project.

3. To edit the copied project, first assign a new project number. Then adjust the project information, if necessary. For more information, see Creating a project.

Print the project list

You can print the InLoox project views as well as project pages - all print settings and functions are located in the Print dialog box. In this window you can make all the desired settings for printing.

Click **Print** on the **Start** tab and the dialog window opens. You will see the print preview and all the important functions that you can use. To set the optimal display of the document to be printed, click on **Scaling** and select the desired percentage value from the drop-down menu. With the help of the scaling you enlarge or reduce the document in percentage to the current size.

Restore a project

Recycle Bin

In the recycle bin you will find all projects that you have previously deleted in the project list.

To remove a project permanently, click **Permanent delete**. **NOTE** You need the appropriate permissions for this. The administrator can manage them in the InLoox settings.

If you have deleted a project by mistake, you can get it back by clicking the button **Restore from recycle bin**.

Archive

In the archive you will find all the projects that you have previously archived.

To restore a project just click the button **Restore from archive**.

Print the project list

You can print the InLoox project views as well as project pages - all print settings and functions are located in the Print dialog box. In this window you can make all the desired settings for printing.

Click **Print** on the **Start** tab and the dialog window opens. You will see the print preview and all the important functions that you can use. To set the optimal display of the document to be printed, click

on **Scaling** and select the desired percentage value from the drop-down menu. With the help of the scaling you enlarge or reduce the document in percentage to the current size.

Search and filter projects

Search function

1. Click on the field with the **magnifying glass** above the project list.
2. Enter a search term here.
3. All projects that contain the text you entered will be displayed.
4. When you have finished searching, end the search by clicking on the **X** (close search) next to the **magnifying glass**.

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, advanced text and date filters are available. For example, you can filter your project or task list by different date ranges:

Click the **funnel icon** that appears when you hover over a column heading, then click the **Date Filters** tab

Favor projects

To mark a project as Favorite, make a right click on a project and select the entry "Favorite".

In the project list the project gets a yellow star.

Quick access to projects

The last used projects can be found on the left side under "Projects".

Here you will also find the project favorites and also your own projects.

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.

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

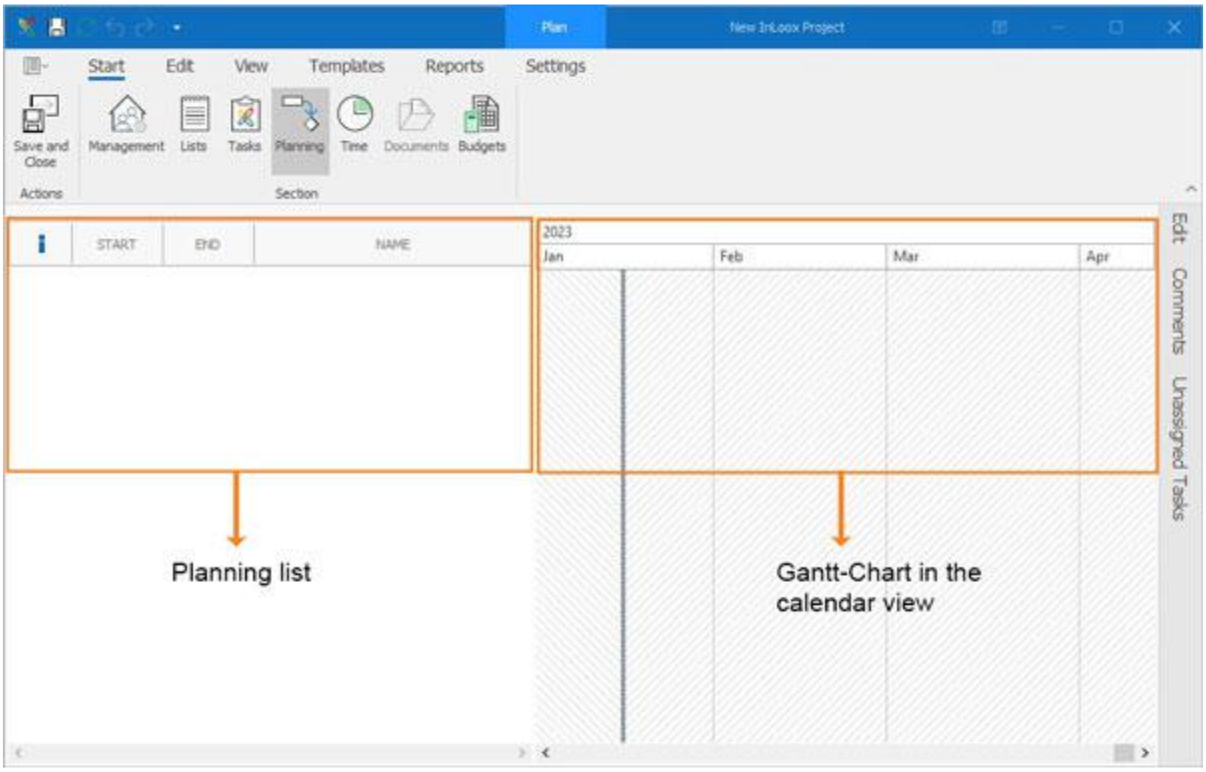
The following steps guide you through creating a new project Gantt-Chart with InLoox.

Create new activities and milestones

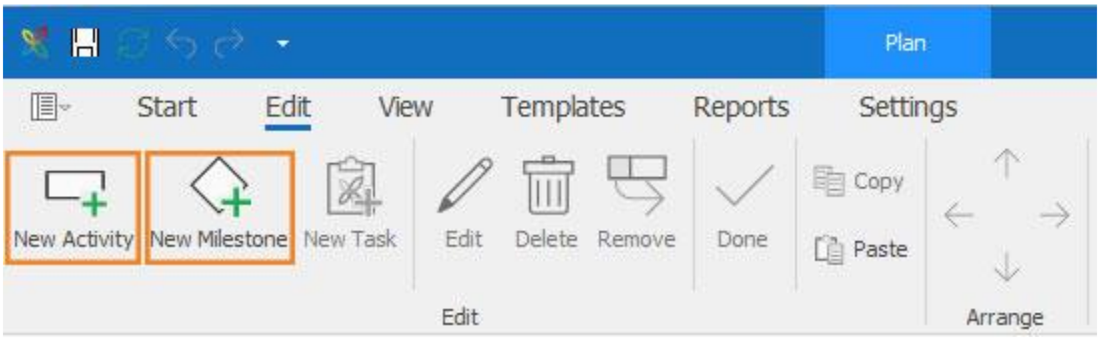
To create activities and milestones, proceed as follows:

1. Open Outlook and click on the tab **InLoox.**
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.

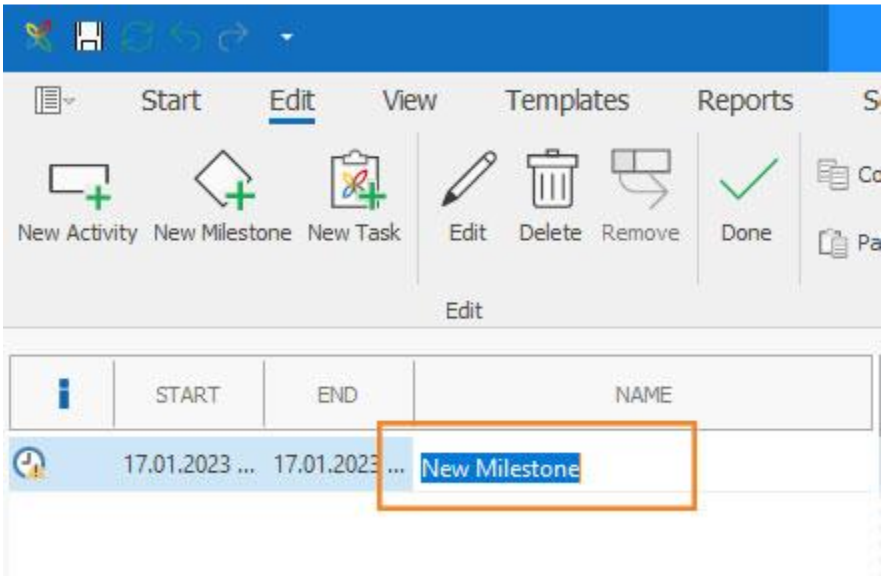


Click on the tab **Edit**. Then click on **New Activity** or **New Milestone** to create one of these new planning elements. You can also use the short cuts Ctrl+N (or Cmd+N) for a new activity or Ctrl+M (or Cmd+M) for a new milestone.



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).

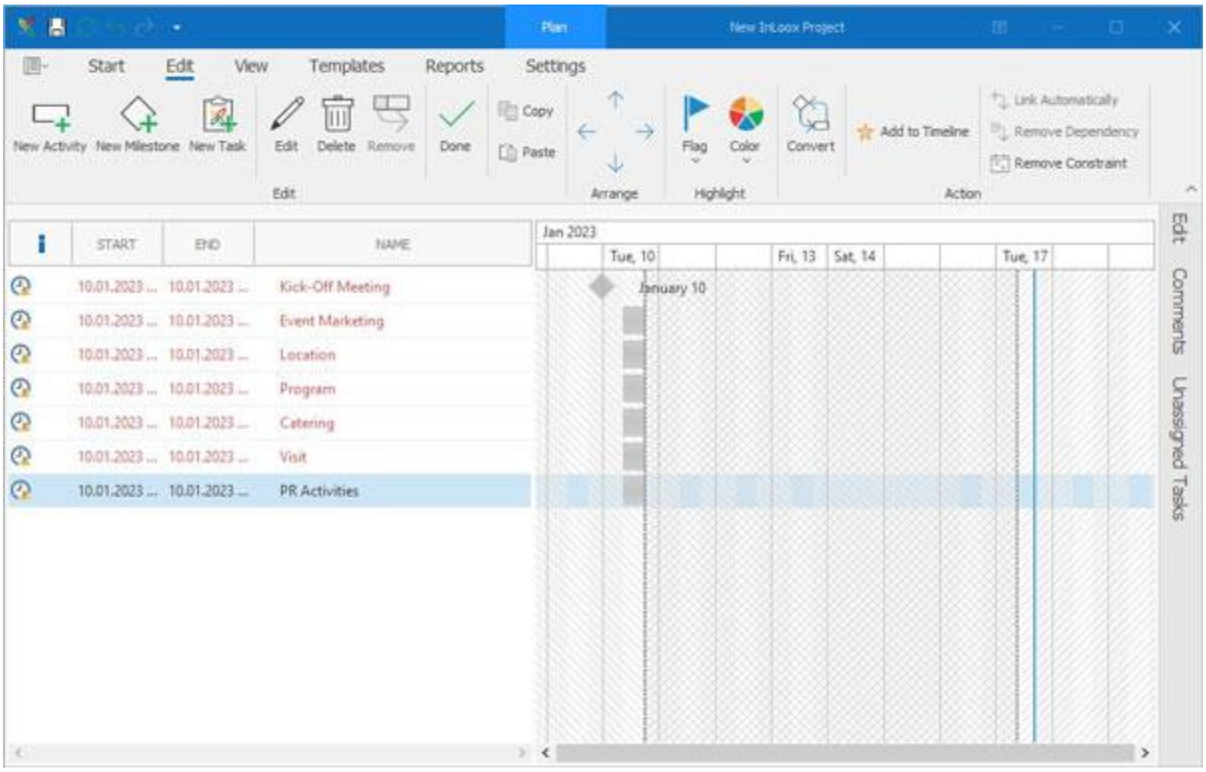


2. You see the **New Milestone** in the planning list. Give it a new name, e.g. "Kick-off meeting". Press ENTER to save.

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).

When 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.

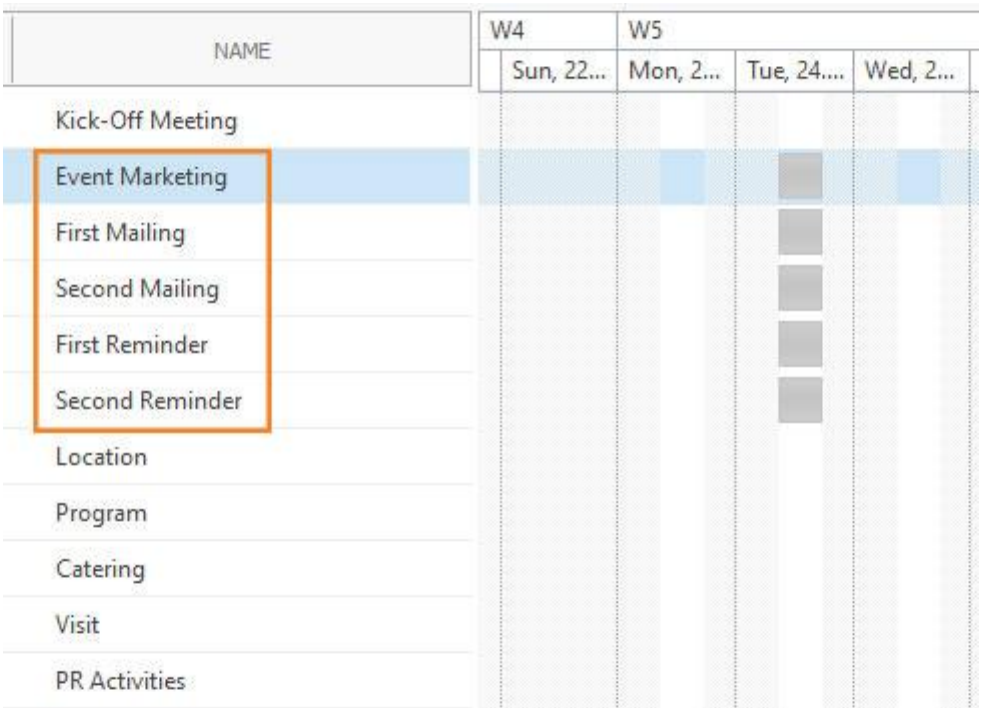


Create summary activities

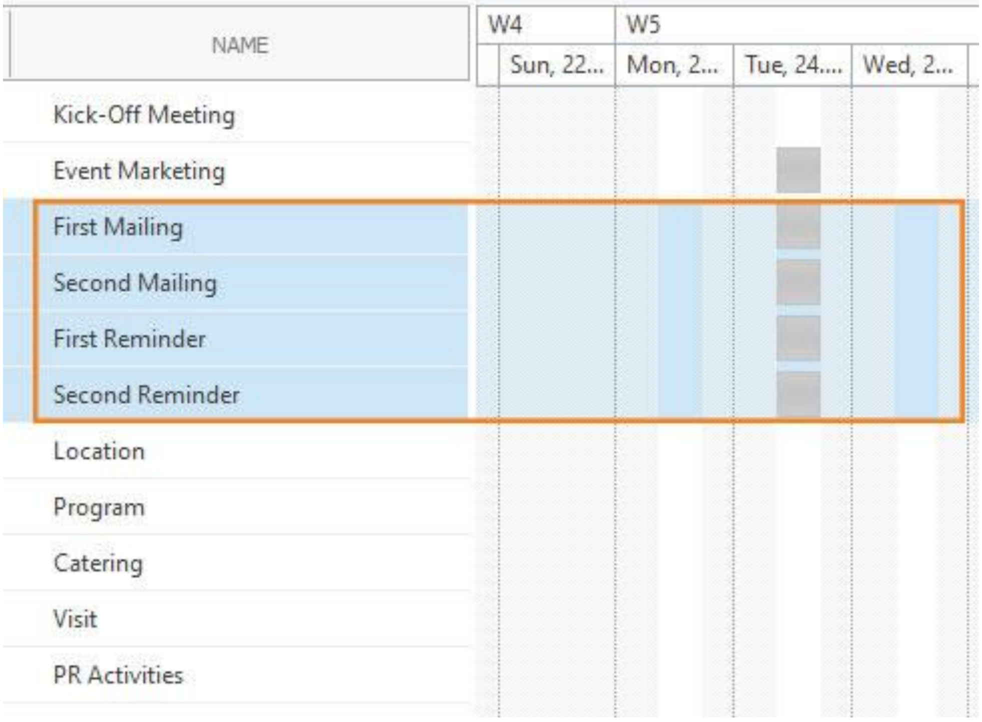
If you combine several activities which are logically connected and need to be finished within the same time frame, you create a summary activity.

Proceed as follows:

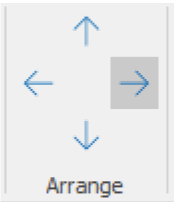
1. Create all those activities, that you want to combine, e.g. all marketing activities.



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.

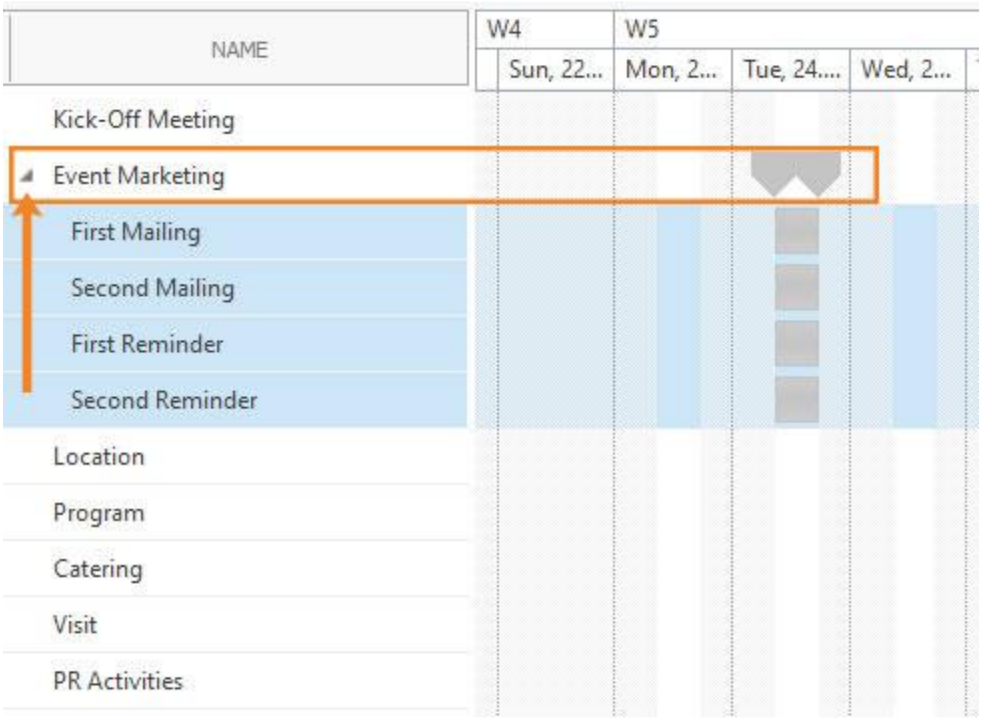


3. Then click in the ribbon on **Edit** and click on the right arrow in the section **Arrange**.

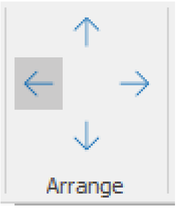


The individual activities are now indented.

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.



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**.

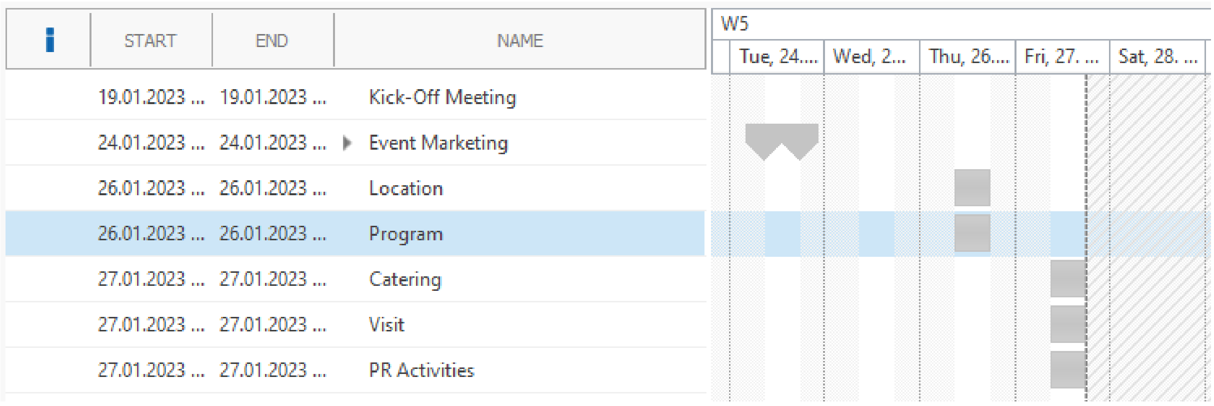


ATTENTION The duration of the summary activity is calculated based on the start and end dates of the subordinate activities. I.e. that a summary activity starts on the start date of the earliest subordinate activity and ends on the end date of the latest subordinate activity. If you change the start and/or end dates of the subordinate activities, the duration of the summary activity is automatically adjusted.

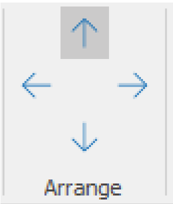
Change the order of the planning elements

In order to change the order of the planning elements, proceed as follows:

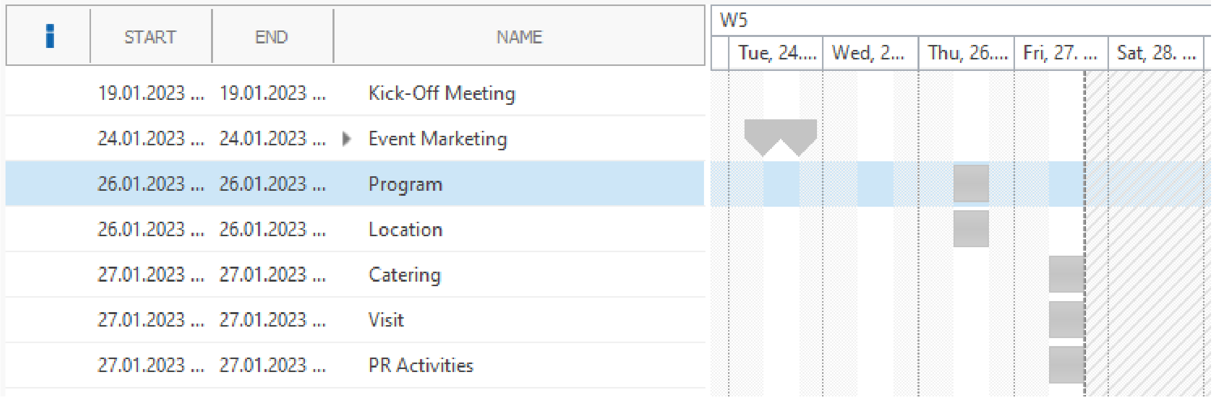
1. Click on the planning element that you want to move.



2. Open the tab **Edit** and use the arrows in the section **Arrange** to move the planning element up or down the list.



3. The element *Program* is now moved up.



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**.

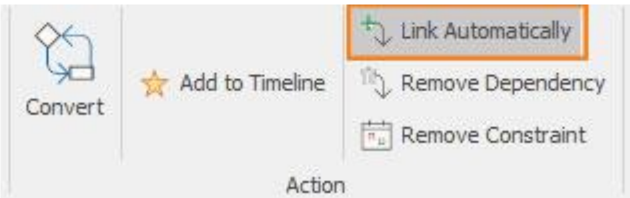
ATTENTION Summary activities cannot be converted.

Link planning elements automatically

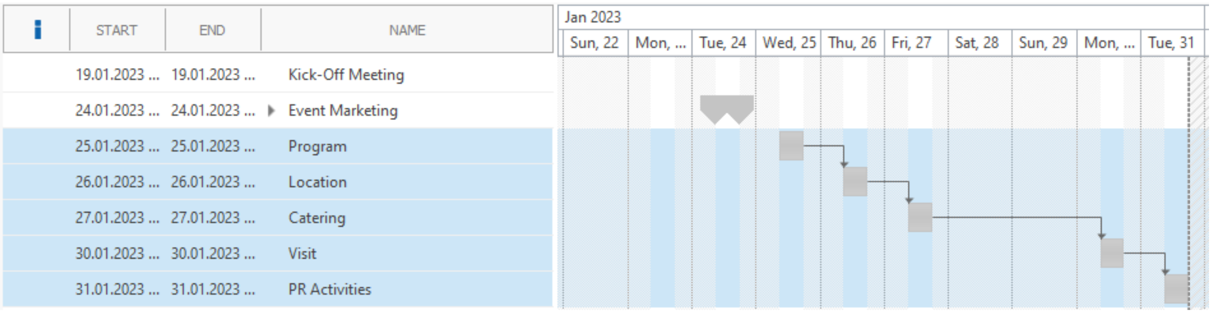
If you have created the planning elements in a chronological order, you can link them with just one click and create dependencies between the planning elements. That way, you create a project plan based on the waterfall model.

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**.

TIP: In order to see flagged planning elements, display the field **Flag** InLoox Planning 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 the symbol with arrows.

2. Now, click on the planning element and move the cursor to the other planning element to link them.

3. Let go of the cursor. The two planning elements are now linked. This way you get linked planning elements, which are considered as *predecessors* or *successors* of the respective other planning element.

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.

ATTENTION 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 settings 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.

4. Now, set the **Duration** of the activity by either entering the minutes, hours, or days or 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.

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.

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, 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.

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. Click on the planning element you want to edit. Now you can **edit** the planning element in the side panel on the right.
2. In the section **Time Frame** you have the field **Constraint** where you can now set the restriction for this planning element.
3. 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.

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.

Overview: Types of constraints

You can set different kinds of constraints on planning activities.

- **Start 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.
- **End date is as late as possible** – Select **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.
- **Start is on a specific date** – If your planning element is supposed to start (activity) or happen (milestone) on a specific date, select **Start** - **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 - 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 timeline.
- **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** - **No later than** and then choose the date and time from the calendar.
- **Planning element must be completed on a specific date** – If a planning element needs to be finished on a specific date, select **Finish** - **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.
- **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** - **Not earlier than** and then select the earliest possible date and time from the calendar.
- **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** - **No later than**, then choose the latest possible date and time for the completion from the calendar.

NOTE 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.

3. You can also add lead time. Click on **Negative** when the successor can start before the predecessor is completed.

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. How this works, you will learn in this article.

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. Alternatively you can enter all the relevant information for the task also in the side panel that opens on the right side. 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.

Publishing 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. In the side panel on the right you will find the group **Publications**.
3. Under **Publications**, click on **Select project.**
4. A drop-down menu will open. The projects for which you have the reading permission are displayed. You can select the desired target project either by double-clicking or by clicking once and then clicking **Apply**.
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 recycle bin right of the target project.

TIP Display the publications in the planning list. If an element has been published, you can recognize this by the displayed icon. This way, team members can see at a glance in the Gantt plan which planning elements have been published to other projects.

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

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 a circular 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.

Clicking on 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 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 – shows the time that is allocated to the task and the accumulated time for the planning element based on the assigned tasks
- Work duration – available time for the completion of the planning element or task
- 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
- Documents – shows whether documents are linked to the element
- 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 planning element
- Info icon – shows if an element is done, overdue, locked, or violates a constraint
- Calendar – shows which calendar is used for this Gantt-chart
- Flagged icon – shows which elements are marked with a flag
- Critical – marks the planning elements along the critical chain as true or false
- Successor – shows the succeeding planning element if a dependency exists
- Location – free text field for you to enter the location the planning element takes place at
- WBS Code (calculated) – shows the automatically calculated work breakdown structure code
- WBS Code (manual) – free text field for your own work breakdown structure code
- Resources – shows the name of the assigned resource
- Start – shows the start date of the planning element

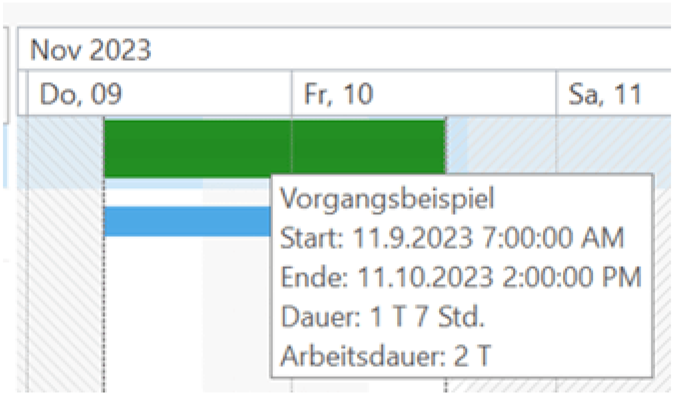
- Published icon – marks those elements that are used in other project plans
- Predecessor – shows the preceding planning element if a dependency exists

Note To ensure consistent presentation and labeling between InLoox Web App and InLoox for Windows/Outlook, we have adjusted and harmonized some labels for InLoox 11.4.2. The differences:

- Effort = Effort of the task or Summarized effort of the tasks subordinate to an activity
- Duration (former *Work duration*) = planned duration of the activity **in workdays**
- Timespan (former *duration*) = Effective duration incl. non-working time, calculated on the basis of the defined working time calendar

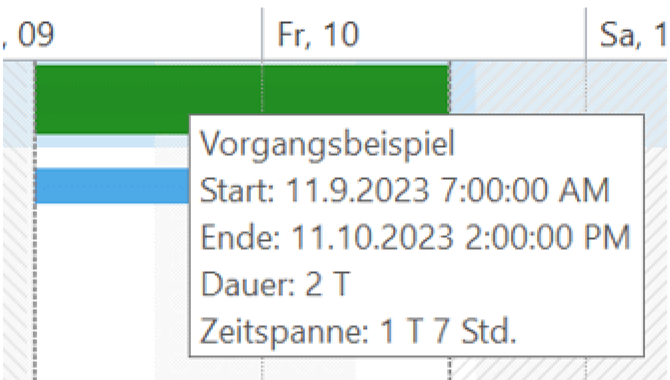
Until InLoox 11.4.1

i	NAME	EFFORT	WORK DURATION	DURATION
	Activity Sample	1 d	2 d	1 d 7 h
	Task Sample	1 d	2 d	1 d 7 h



Since InLoox 11.4.2

i	NAME	EFFORT	DURATION	TIMESPAN
	Activity Sample	1 d	2 d	1 d 7 h
	Task Sample	1 d	2 d	1 d 7 h



Create your own fields

You can also define your own fields for the planning list. To be able to create your own fields, you need administrator rights. You can learn more about this under the settings.

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 and in your planning list.

Show slack

InLoox shows you how far you can move a planning element before this affects the planned duration of the project and, for example, shifts the completion date.

To do this, follow the steps:

1. Go to the tab **View.**
2. Under the group **Details**, click on **Show Slack.**
3. Select a planning element. The time distance in days is then displayed directly in the planning.

Show timeline in project plan

In each project planning, you can visually highlight individual planning elements that you want to have a closer look at in a timeline.

1. Open the project planning and first display the field with the pin in the planning list.
2. Under **View**, click on **Show Timeline**. An empty timeline now opens under the ribbon.
3. Select the planning elements that are to be visualized in the timeline by clicking on the icon with the pin in the respective line. Alternatively, you can select the planning elements and then go to the **Edit** tab and under **Action** click on **Add to Timeline**.
4. The planning elements added to the timeline are now marked in the planning bar.
5. You can use the sliders to enlarge or reduce the section displayed in the timeline, as well as to drag the timeline itself up or down.

6. If you want to remove planning elements from the timeline again, click on the pin symbol in the planning bar again and the respective element will be removed from the timeline.
7. You can also copy the timeline to the clipboard and send it by e-mail, for example, or save it as an image. To do this, right-click in the timeline and then click **Copy to clipboard**.

Show workload in project plan

Starting from the project planning, you can access the workload overview of resources and view the workload of the project team on a project-specific basis.

1. On the tab **View**, click **Workload** on the far right under **Dialog** to open the resource overview window.
2. Select **Only this project** as the filter option in the ribbon.
3. Now drag the resources whose workload you want to view either from **Divisions and Teams** on the right to the field *Name* on the left or create a **New Team** on the bottom right and drag it to the left.
4. Click on the arrow in front of the team to expand the individual resources and see their workload in the calendar.
5. Under the calendar view, you can see the workload of the selected resource in a bar chart.

Loading, importing and exporting planning templates

Working with planning templates is a convenient way to create project plans quickly and easily. InLoox administrators can also edit planning templates in the InLoox settings.

Load project planning from InLoox template

If InLoox plannings have already been saved as templates on your database, you can use them for a new project.

1. To do this, create a new project and then click **Templates** under Planning.
2. Select an InLoox template.
3. In the **Load template** window, define the time frame for the planning. Select **Automatic Calculation** if you want the start date to be the same as the creation date.

IMPORTANT: If planning elements with restrictions have been saved in the template, InLoox will adopt these settings when importing the template. Thus, start and end restrictions that may be in the past will be applied and all planning elements will have to be adjusted manually.

If you want to set the start date manually, select **Manual Calculation** and choose a date from the calendar.

IMPORTANT: If planning elements with restrictions have been saved in the template, then InLoox will NOT take over these settings when importing the template. Start and end restrictions are not applied and all planning elements with the restriction Start = As early as possible are imported. This facilitates the further processing of the planning and is the recommended procedure by InLoox.

4. We recommend that you accept the preselection for both **Load resource data** and **Remove completion data**.

- **Load resource data** - The resource assigned to the task and the estimated effort, if any, are taken from the InLoox template. If you do not check the box, these fields will remain empty in the tasks.
- **Remove completion data** - The *Completed* marker will not be transferred. No planning element will be marked as completed in the new planning.

Import templates and save them as InLoox template

To make planning templates available to all InLoox users working on your database, you can import files and then save them as InLoox planning templates. In addition to InLoox planning files, you can also import Microsoft Project ® files.

Import Microsoft Project ® template

You can import a planning template created with Microsoft Project ® into InLoox.

1. To do so, click **Import Templates** in the ribbon and select the Microsoft Project file format you want to import.
2. Select the file from your server and click **Open**. The planning will now be displayed in the Gantt chart.
3. To save this planning as an InLoox template, click **Save Template** in the ribbon and give the template a name. Confirm with **OK**.

All InLoox users working on your database can now access this template.

Import InLoox template

An InLoox planning file ends with *.inlooxplanning. To import such a file, follow the same steps as described above.

Export templates

When you export a planning as a template, you save it to your server or local storage.

1. Click **Export Template** in the ribbon. InLoox offers you three different file formats for the export:

- InLoox planning file
- Microsoft Project XML file
- Image in *.png., *.jpg, or *.bmp format

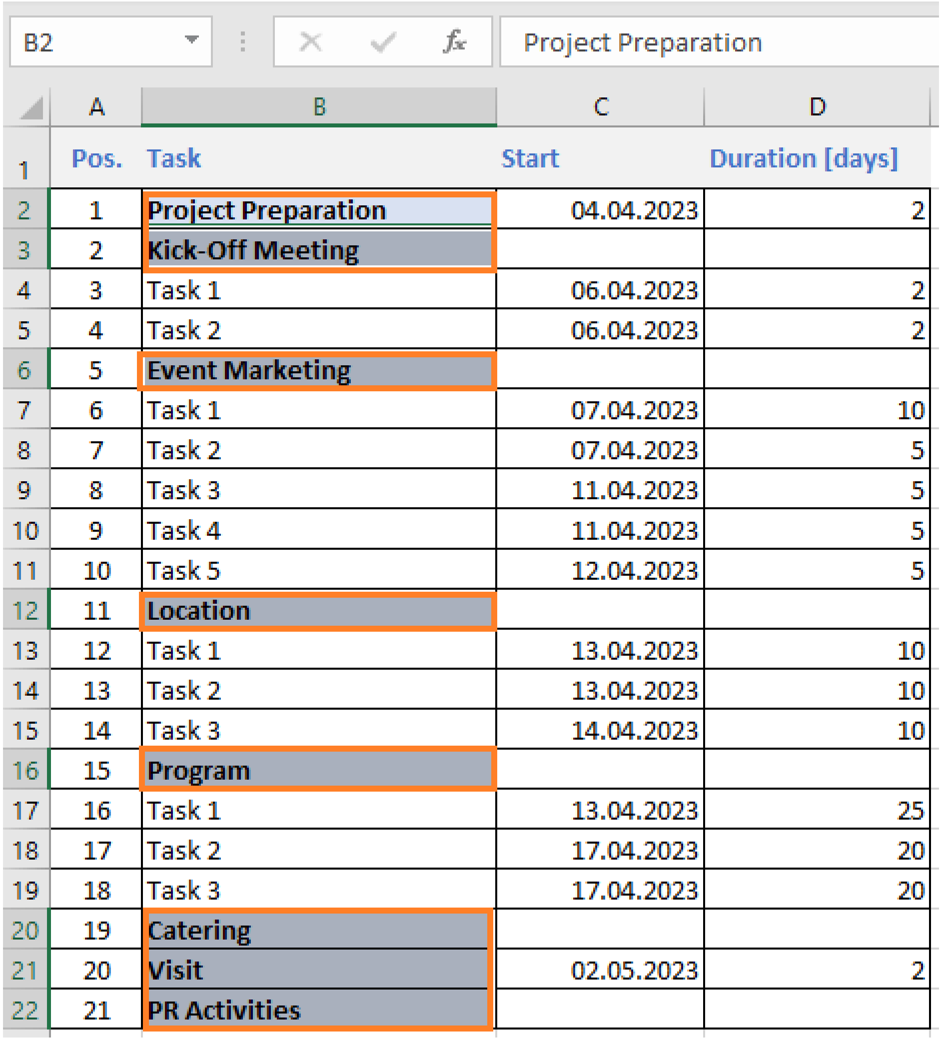
2. Select the format, choose the location and confirm with **Save**.

TIP If you want to save the planning as an image, first adjust the planning view according to your needs. InLoox maps the current section of the planning that you see in the active Gantt chart itself.

Copy data from an Excel spreadsheet

If you have made a planning in an Excel spreadsheet, you can transfer it to an InLoox planning by using Copy/Paste.

1. Open the Excel spreadsheet and select the data that corresponds to the planning elements (activities and milestones) in your Excel spreadsheet.



B2 | Project Preparation

	A	B	C	D
1	Pos.	Task	Start	Duration [days]
2	1	Project Preparation	04.04.2023	2
3	2	Kick-Off Meeting		
4	3	Task 1	06.04.2023	2
5	4	Task 2	06.04.2023	2
6	5	Event Marketing		
7	6	Task 1	07.04.2023	10
8	7	Task 2	07.04.2023	5
9	8	Task 3	11.04.2023	5
10	9	Task 4	11.04.2023	5
11	10	Task 5	12.04.2023	5
12	11	Location		
13	12	Task 1	13.04.2023	10
14	13	Task 2	13.04.2023	10
15	14	Task 3	14.04.2023	10
16	15	Program		
17	16	Task 1	13.04.2023	25
18	17	Task 2	17.04.2023	20
19	18	Task 3	17.04.2023	20
20	19	Catering		
21	20	Visit	02.05.2023	2
22	21	PR Activities		

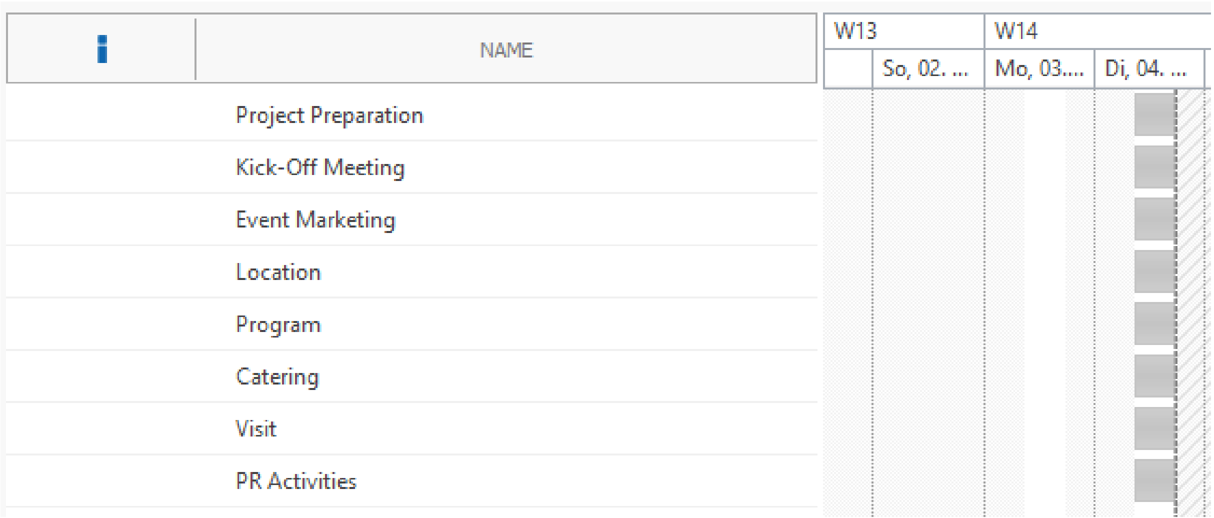
NOTE Please note that when you copy multiple cells in a column, Excel also copies the cells in between. In this case, we recommend selecting each cell individually, copying it and pasting it into the InLoox planning.

2. Click on **Copy**.

3. Open the InLoox project and the planning where you want to copy the Excel elements.

4. Now click **Paste** in the InLoox Planning ribbon under **Edit**.

5. The elements copied from the Excel spreadsheet to the InLoox planning are displayed as activities with a start date according to the project start.



Now you can edit the planning elements as usual.

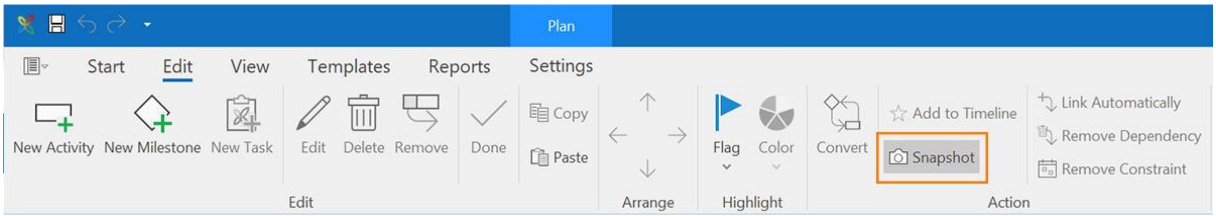
Snapshot Feature

The snapshot function in InLoox Planning allows you to record the current status of your project Gantt-chart. You can use the snapshot as a reference to visually track the changes to the Gantt.

Creating a planning snapshot

1. Open the project, go to the **Planning** of the project.

2. In the **Edit** tab, click on **Snapshot** in the menu under **Action**. The snapshot bar appears below the Gantt-chart.



3. Click into the **New Snapshot** field on the right, enter a name, e.g. "As-is-01-11-2024" and click on the camera icon. The snapshot is created.

4. When you hover over the snapshot with the mouse, a window opens.

You can now:

- Show (**Overlay**) this snapshot in the Gantt chart.
- **Delete** this snapshot. InLoox asks you whether you really want to delete the snapshot.

5. By clicking on a snapshot, this status is also displayed and you can see the changes in the planning that have been made since the snapshot in the Gantt chart. This does not overwrite the current planning.

6. If you want to hide the displayed status again, click on **Current state** at the bottom of the snapshot bar.

7. If you want to hide the snapshot bar again, click on **Snapshot** in the menu again.

Change planning direction

When you create a new project, InLoox defaults the planning direction to forward scheduling from the project creation date. If you want to change this, you can do so in the **Settings** tab and either select a different planning start for forward scheduling or change the planning direction to backwards scheduling.

Changing the planning start of forward scheduling

1. After you have created a new project, click on **Planning** and there, on the **Settings** tab, on **Direction**.

2. Click on the date and enter the new planning start manually or select a new start date from the calendar and set an exact time if necessary.

3. Now click on the **Edit** tab and create your project planning. The planning elements you now create will start on the start date you set.

Backwards scheduling

1. After you have created a new project, click on **Planning** and there on the **Settings** tab on **Direction**.

2. First click on **Backwards scheduling** to set a check mark.

3. Click **Direction** again and now select the planning end by either entering it manually or selecting it from the calendar.

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: Double click to open an already existing project or, to create a new project, click in the ribbon on the **Start** tab and on **New Project**.

2. Activate the **Fixed Deadline** in the management view on the **Edit** tab.

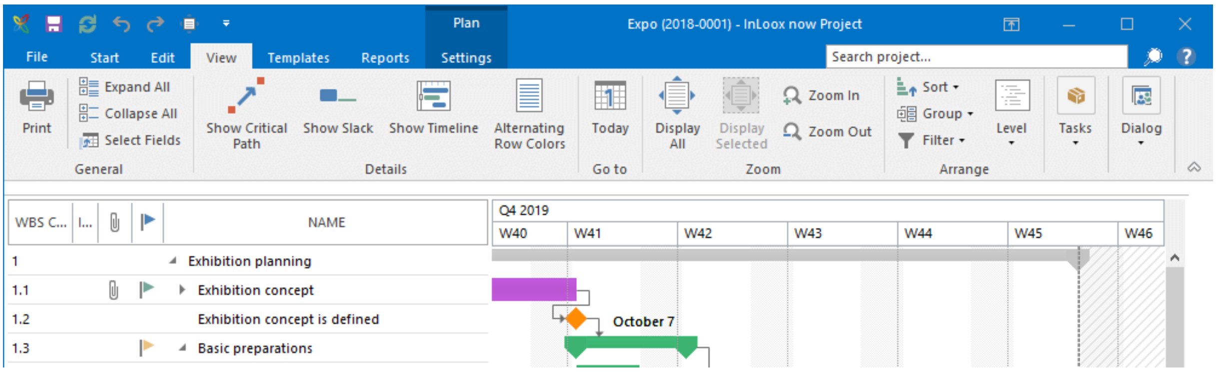
The feature highlights all activities that are delayed beyond the project end date (specified on the management page) in an orange shaded field in the planning. See at a glance whether the project can be completed on time or whether delays have negative effects on the deadline.

3. You can activate or deactivate the feature at any time in the management view of your project.

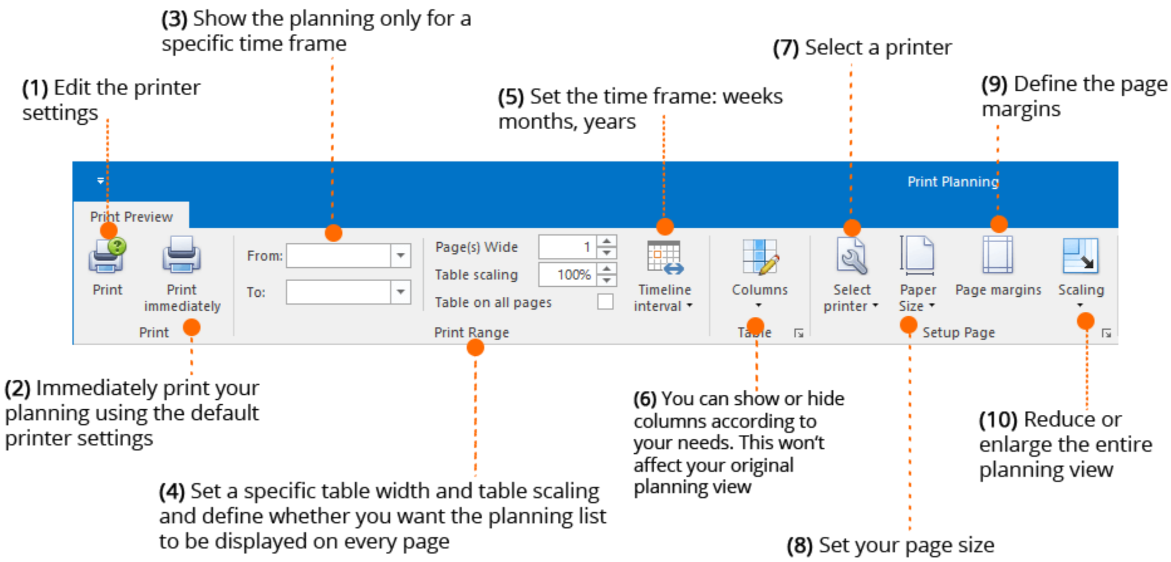
Print planning

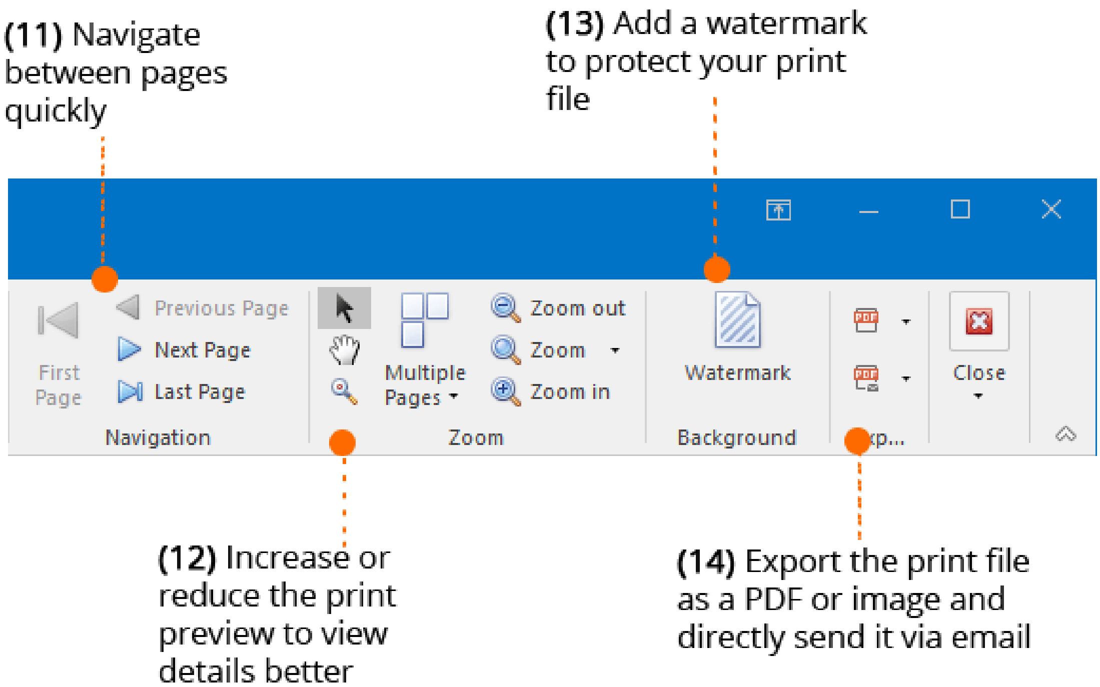
1. How to open the print preview

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

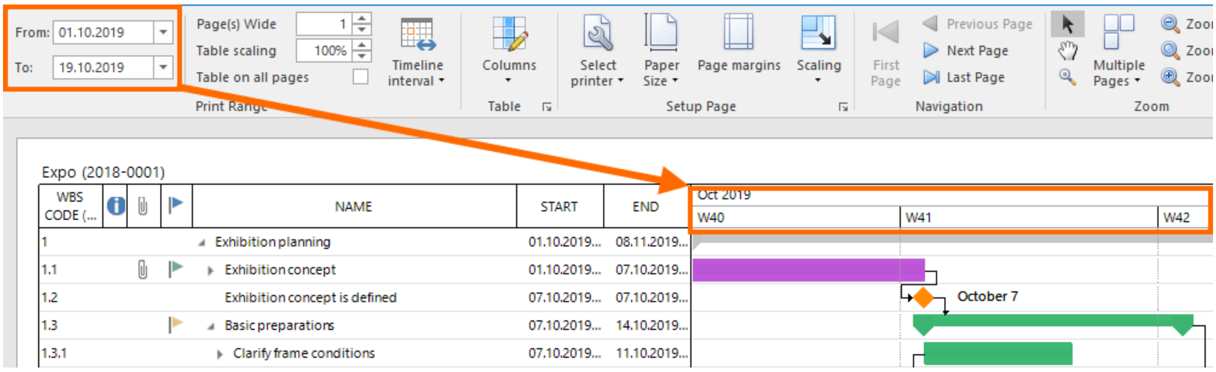
Edit the printer settings before printing. E.g., determine which pages you want to print or whether you want to print in landscape or portrait mode.

(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.



(4) Table settings

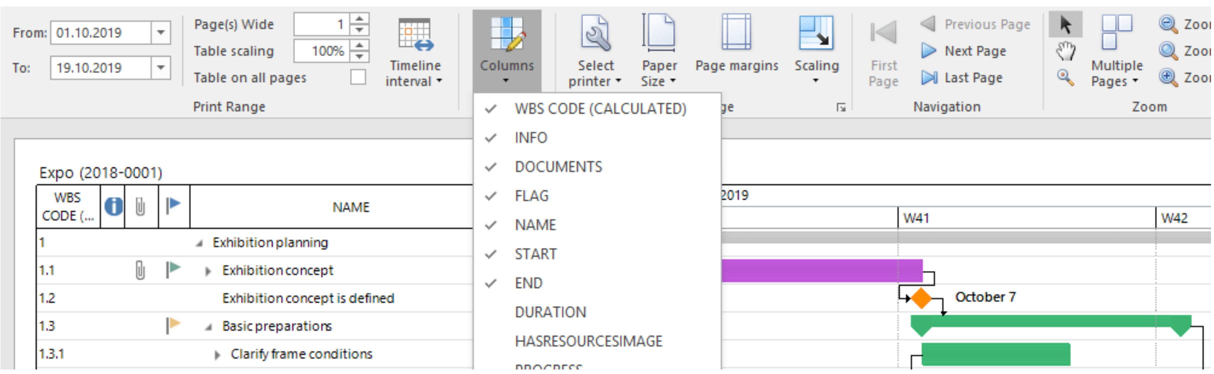
- You can set a specific **width** for your table by choosing 1-5 with 1 being the default setting. The bigger the width of your table, the more detailed will your print be and, of course, longer.
- You can also customize your table via the **table scaling**. E.g., if you want to see the complete project 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.



(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.

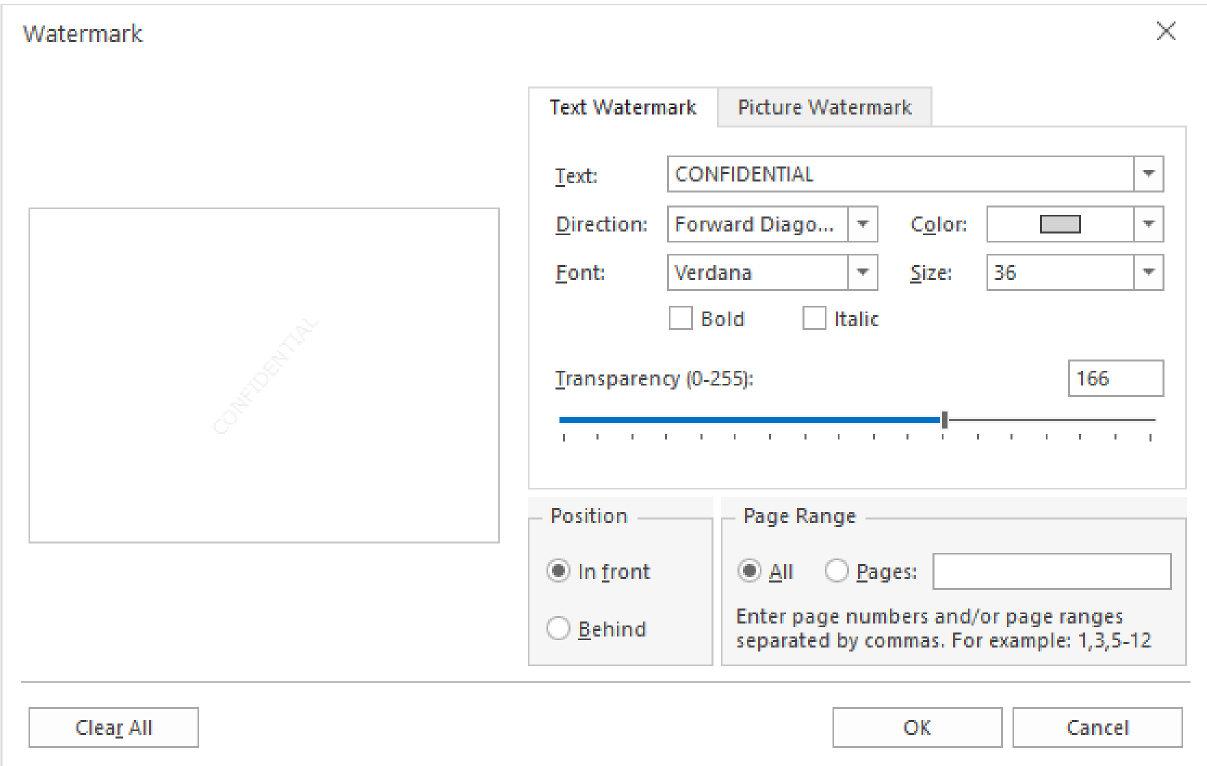
(12) Zoom

Enlarge or reduce the print preview – this won't affect the actual print, it's merely an optical zoom.

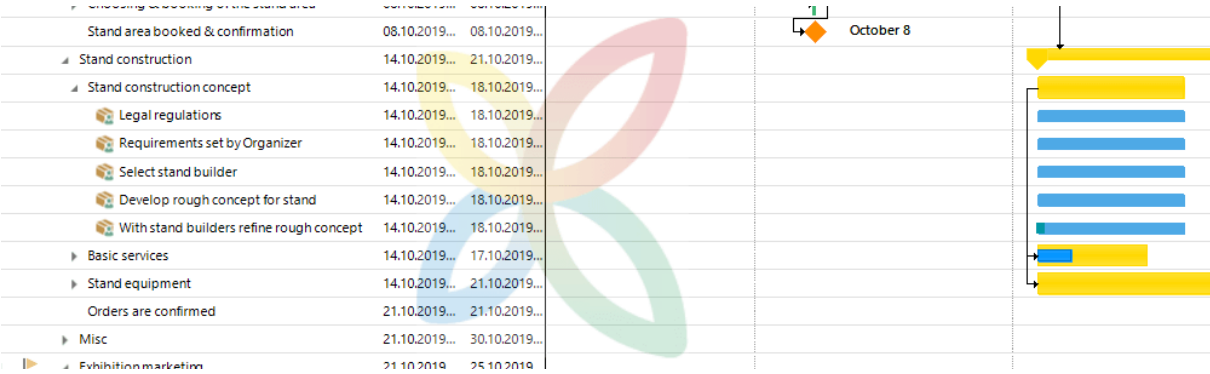
(13) Watermark

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.

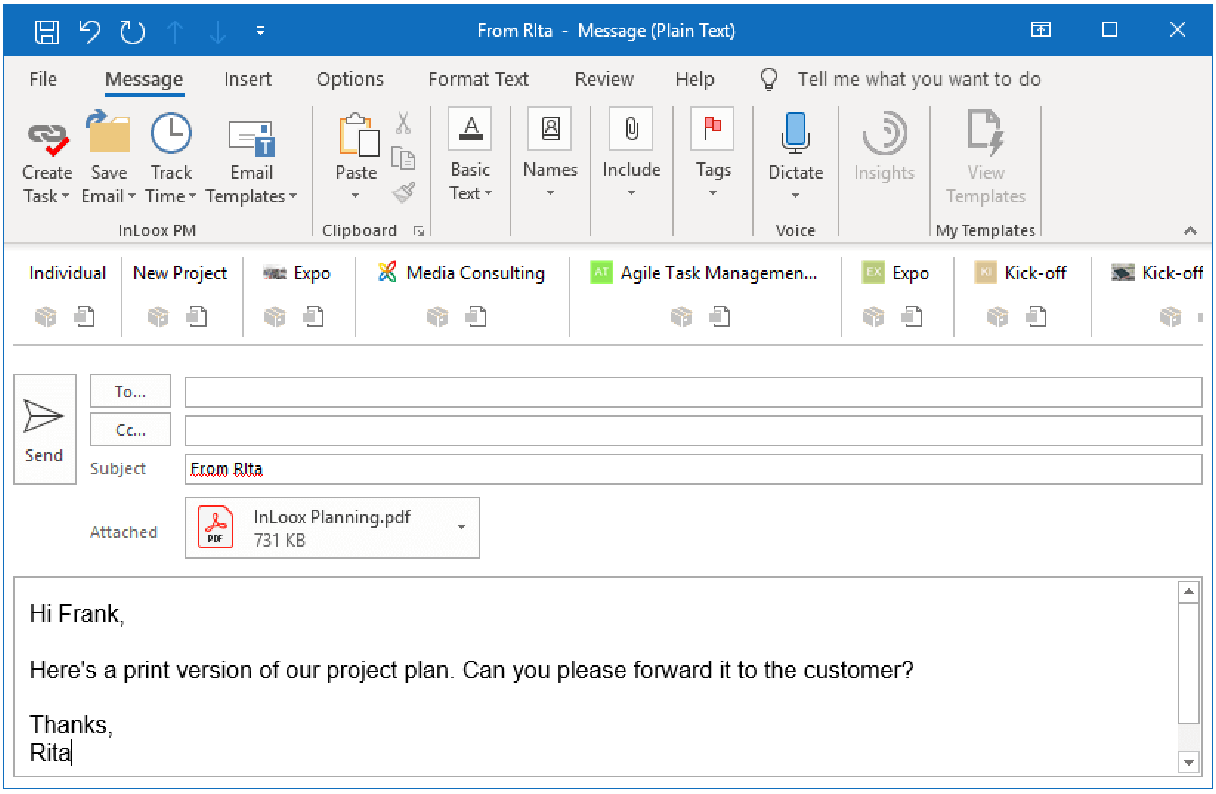
(14) Export & Send as email

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.

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.

Creating tasks manually

1. You are in the project for which you want to create a new task.
2. Click on **Tasks** in the ribbon on the **Start** tab.
3. Now click **New** on the **Edit** tab in the ribbon.

Alternatively, you can also click on **the plus in the respective column**, then the new task will be assigned directly to this column.

A new task appears in the left column of your Kanban board. At the same time, the page panel for editing tasks opens on the right.

- **Name and description:** Now assign a name to your task and describe it.
- **Effort:** Enter the estimated effort for the task. By clicking on the small black arrow you can change the unit from hours to working days (equivalent to 8 hours by default) or minutes.
- **Resource:** You can assign the project task to a resource, but you do not have to. In classic Kanban, team members "pull" tasks themselves from the Not Started column. For a quick selection of frequently used resources, click on the small arrow; for the global address list, click on the three dots to the right of Resources. Now select the person who will be responsible for the task. Only one resource can be assigned to each task.
- **Start/End:** You can give your task a time frame, but you do not have to. If you want to specify a start and/or end time, click the arrow next to Start or End and select Date and Time. If you assign a task to an activity in the project schedule, its start and end are automatically taken over. However, you can change this again manually. Note: We recommend scheduling a task only within the time frame of the activity to which it belongs.
- **Documents:** If certain documents belong to the task, you can link them to the task by clicking **New link** in the Documents area. You will then get an overview of all project documents that have already been created in InLoox and for which you have read permission. If there are no documents in your project library yet, you can upload a new document and link it directly to the task by clicking **New**, selecting a document from your computer and confirming with **OK**. **Tip** If you want to link a document to a project item, but you have a lot 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 entry dialog and type in the search term.
- **Budget:** You can assign the task to a specific budget group. For each budget group, an internal price per hour is stored in InLoox PM. This will be applied to the task by the assignment. Budget groups can be set by the InLoox administrator in the InLoox options. By default, the Billable checkbox is activated. This means that for the time spent on the task, a plan output for the resource costs is created in the project budgets. You can then create an actual revenue from this in the budgets. If you uncheck the box, this will no longer be possible.
- **Notifications:** The added resources will automatically receive a notification about the task. In the Notifications area, you can inform other people, e.g. the project management or a substitute, about the new task and any changes to it. To do so, click on the small arrow for a resource quick selection or on the three dots to go to the global address book. How and when a resource is notified is defined by the InLoox Administrator in the InLoox Options.

Finally, click **Save** on the **File** tab in the upper left corner if you want to save the task but still continue working in the project or **Save and Close** if you want to save the task and close the project.

Editing tasks

You can edit an existing task by clicking on it and then clicking **Edit** on the **Edit** tab in the ribbon. The page panel that you already know from creating a new task will open. You can now make the desired changes to the task.

You can also quickly edit certain information of a task inline, such as the task name, start date, effort or resource.

If a task is done, you can select it and click **Done** on the **Start** tab in the ribbon. The same command can be found in the context menu. To do it, right-click the task and select **Done**.

When a resource marks a task as done, all people registered on the task under Notifications will receive a notice about it. The task is automatically moved to the Completed column or to the right outer column of the Kanban board. The completion is also reported back to the project schedule and is included in the project progress calculation. If a project manager marks the task as done, then the responsible resource and all the people entered under Notifications will receive a notification.

Tip If there are many similar tasks in your project, you can copy the tasks. To do this, click on the task with the mouse, click **Copy** on the **Edit** tab in the ribbon, and then click **Paste**.

Attention If the copied task contains constraints from a task in the planning in the original version, these constraints will not be taken over when copying. However, manually set start and end dates will be applied.

Deleting tasks

You can delete tasks by clicking on the corresponding task in the list and then clicking **Delete** on the **Start** tab in the ribbon. This function is also available in the context menu, which you can reach by right-clicking on the task you want to delete.

When you delete a task, the people for whom you have set up notifications will be informed about it. If you, as a project manager, delete a task for which another resource is responsible, then that resource will be notified about it.

Note The deleted tasks are irrevocably removed, you cannot restore them.

Tip If you want to delete several tasks at once, you can do it with Multiselect. To do this, hold down the CTRL key on your keyboard and left-click on the tasks you want to delete. Now select Delete in the ribbon.

Team task management with Kanban

This is how a Kanban board is structured

A Kanban board is read from left to right: On the far left are always the unfinished tasks or the backlog. On the right side there are always the completed tasks.

In each status column the hours of all tasks which are in the column are added up. This is handy if, for example, you only have a certain quota of hours for the project. You can quickly see the estimated effort of all tasks in the project without having to go to the dashboard for it. As soon as you move a task to another column, the number of hours in the respective status column adjusts automatically.

Change and delete status

You can customize the number and naming of the columns to suit the way you work. To do this, click **Edit Status** on the **Edit** tab. A page panel opens on the right:

Click **New Status** to add another column to the view. You can give the new column a name and assign it a color. Your Kanban board would now have four columns.

You can also edit one of the existing states. In the side panel, click on the state you want to change and in the dialog box, change the name and the color assigned. The color helps you to identify tasks with the same state at a glance.

You can use the arrows to control the order of the Kanban columns - the top entry in the list is the leftmost column, the bottom entry is the rightmost column. You can delete columns using the cross.

New tasks always appear first in the leftmost column. You can drag them to another column to change their status and color assignment. For example, when a team member starts working on a task, they can drag it from the Not Started column to the In Progress column. This way all team members can see who is currently working on what. Once you drag the task to the far right column, it is considered complete.

You can recognize **overdue tasks** by the red marking of the start and/or end time. For example, the following task should have already been started, but is in the Not Started column.

Attention: No matter how you name and arrange the columns - in InLoox, the tasks in the leftmost column are always listed as Uncompleted and the tasks in the rightmost column are always listed as Completed.

Note: Adjustments to the Kanban board are always visible for the entire project. If you want to define a Kanban structure for all projects in the database, the InLoox administrator has to define this in the InLoox settings.

Meaning of the icons on the Kanban cards

You can see directly on the task card if the task was created from a mindmap node and if it was added to a planning process. Click on the respective icon to go directly to the corresponding mind map or planning process. You can also see from the icons how many lists, documents and notes a task has.

Customize the task view

Sort

You can arrange the tasks on the Kanban board according to different criteria. To do this, click **Sort** on the **Edit** tab in the ribbon and select by which criterion you want to arrange the tasks:

For example, if you arrange by workload, you will see which task takes the least amount of time. Only you can see this arrangement locally on your computer.

Color

You can also assign an individual color to each task, which overrides the color of the current task status. This way you can highlight and mark tasks individually. Again, this highlighting only applies to the individual user, other InLoox users will not see this.

Click on the task you want to highlight in color. Then click **Color** on the Edit tab in the ribbon and select the color you want.

Show details

To view the details of the task in question, open it. Either click on the corresponding task card and select **Edit** under the **Edit** tab or double-click on the corresponding task card. Then a corresponding menu will open on the right side. Here you can view all the stored information and edit the task itself. You can also see the comments of other project participants and the project status.

Filter

Using the full text filter you can additionally select tasks. For example, filter by a resource name to see only the tasks of the respective person in the project or filter by a specific keyword. Use the search field provided for this purpose, which is located above the Kanban board, and confirm your search by clicking on **Find**.

Assign tasks to resources

To assign a task to a specific person, click the **person icon** on the task card.Here, select the appropriate resource from the drop-down list or open the global address book by clicking **Address Book**.

Alternatively, you can click **Select resource** in the navigation bar at the top. The address book will then open.

If you want to assign the task to another person, you can simply click the **image or the resource name** again and select the new resource from the list. If you want to remove a resource, click **Remove resource** at the very bottom of the resource list.

Tip You can also filter by specific skills in the global address book, for example, if the task can only be done if the resource has English skills. To learn how to assign specific skills to resources, see the Skills chapter.

Note Divisions and teams in Kanban are no longer available in InLoox 11.

Task templates

If a certain set of tasks comes up again and again in your projects, it makes sense to save them as a task template. For example, these can be tasks that typically arise during a trade show appearance or a product launch. This way you don't have to create these tasks over and over again, but only make adjustments for your current project.

Saving and loading a task template

1. First, create the tasks you want to use in your template in a project. You can learn how to do this under Create project tasks.
2. To save the task template directly in InLoox in the Gallery view, click **Save template** on the **Templates** tab in the **Tasks** section of the ribbon in the project. Assign a name for your template and confirm with **OK**.
3. The task template is now available in all your InLoox projects in the Gallery view in the Ribbon. You can find the gallery view in the project in the **Tasks** section on the far left of the ribbon on the **Templates** tab.
4. To load a task template from the gallery view into your project, simply click the desired template in the gallery. If there are no tasks in your project yet, the tasks from the template will now appear in the Kanban view, where you can continue editing them. If your project already contains tasks, the tasks from the template will be added to it.

5. The InLoox administrator can rename, delete, export and import the task templates from the gallery view in the InLoox settings. In addition, ready-made templates are available on the InLoox website in the Download section, which you can import into your projects.

Exporting and importing task templates

If you want to save a task template on your computer instead of in InLoox, you can export it. This is useful, for example, to import it into Microsoft Project or to use it in another InLoox database.

1. In the corresponding project, create the set of tasks that you want to save as a template and reuse.
2. In the **Tasks** section, on the **Templates** tab, click Export template in the ribbon. You can now choose whether you want to export the file as MS Project XML file (useful for reuse in Microsoft Project) or as InLoox task template (useful for reuse in InLoox). Select a variant.
3. You can now select the desired location on your computer or file server and name and save the template accordingly.
4. To import a task template, click **Import Templates** on the **Templates** tab in the ribbon in the **Tasks** section of the project. Again, you can import both Microsoft Project files and InLoox task template files. Select the desired file format and choose the appropriate template from your computer or file server.
5. If there are already tasks in your project, the tasks from the template will be added to it.

Add tasks to the project time planning (Gantt)

If your project also includes a project time planning (Gantt chart), then you can assign project-related tasks to the appropriate activity in the Gantt chart. This is particularly useful if a task is to be completed within the time frame of this activity and it is related to the content. However, you do not necessarily have to assign tasks, they can also exist as "free tasks" in the project.

To assign a task to the project schedule, please proceed as follows:

1. Go to planning in the project. To do this, open the project and click on **Planning** on the **Start** tab in the ribbon.
2. Now double-click on the task or collective task to which a task is to be assigned. The page panel for editing planning elements opens on the right.
3. Select the **Unassigned tasks** tab at the top of the page panel.
4. You will now get an overview of all tasks in the project that have not yet been assigned to a planning element in the Gantt chart.
5. Now drag the desired task with the mouse from the side panel to the appropriate activity or milestone.
6. You have the following options:

- Drag the task onto an activity or milestone so that the corresponding row is highlighted. Then release the task. It will now be displayed as a task under this activity. A new task is created in the project plan.

- You can also convert a task into a planning activity. To do this, drag the task from the side panel to the position in the planning list where the new task is to be created. A black line appears in the planning list. Then release the task. A new task is created to which the task is assigned.
- You can also drag the task from the side panel to a collective operation. A subordinate task with the name of the task is then created below the collective task. The task is assigned to this task.

If you want to remove a task from the Gantt chart again, select the task in the planning list. Then click **Remove** on the **Edit** tab.

The task will then reappear in the Tasks page panel.

Adding multiple tasks to the project schedule

You can add single or multiple tasks at once to the project schedule by dragging and dropping. You can select multiple tasks by holding down the Shift or CTRL key. Then you simply drag the tasks to the project schedule.

Create comments

To provide additional information, you can use the comment function. The comment function is available in two different locations:

- On the **Manage** page, you can enter general comments about the project itself.
- In the **task** you can add comments that are directly related to the task.

Adding comments to a task

To add comments such as status updates to a task, double-click on the task within the Gantt chart or Kanban board so that the editing panel opens on the right.

Click on the **Comments** tab and enter the desired text.

Customize the font, color, size, etc., of your comment. All formatting commands can be found on the **Format** tab.

- **Hyperlink:** Create a link to a file, web page or image. Select the relevant part of the note and click the Hyperlink button. In the new dialog box, select the desired file in the Address area and click Open and Ok.
- **Icon:** Select a symbol that is not on the keyboard or is a special character.
- **Image:** Go to the folder where the desired image is stored, select the image and click Open. Adjust the size of the image.

Tip Mention your project members directly in the comment by typing the @ sign and then selecting the desired resource from the drop-down list. Alternatively, you can enter the resource in the **Notify** field.

To submit the comment, click **Post Comment**. The comment is then displayed in the field below.

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:

1. Open Outlook and click on the tab **InLoox.**
2. Click on **Projects** in the navigation bar to get the project overview.
3. Alternatively, you can access the project overview via the tree structure **InLoox >> Projects >> Projects**.
4. Now select **Resource Overview** in the ribbon under **View**. The resource overview opens.

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 in 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. This opens the Kanban view.
3. 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 Settings.

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. Under the tab **View**, 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.
- **All Projects** – Allows you to view the workload of all projects.
- **Only this Project** – Allows you to see only the workload of the currently open project.
- **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** – this feature is currently not yet available and will be provided in a future iteration.
- **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 Workload** – 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.
- **Expand all / Collapse all** – Here you have the possibility to show or hide the divisions and teams in their entirety, so that either all individual divisions/teams with their respective resources are displayed, or only the highest superordinate division.
- **Show 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 settings, if you have the necessary administrator rights. You can also allocate resources to departments.

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. 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. Open the **workload overview** as described in the chapter *Open the resources and workload allocation overview.*
2. Select a group from the **Divisions and Teams** side panel for which you want to show the allocation. To do so, 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.
3. 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 clicking on the ribbon **Expand All**.

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

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. Under the **Divisions and Teams** side panel on the right, click on **New 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 (icon with the person and the plus). **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, and 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 Settings**, 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 by skills, so it only shows the resources who have these skills. To do so, click on **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 Settings** 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** 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.

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 shows 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 shows 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 resource 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**.

Support and contact options

Contact the InLoox support team

Thank you for choosing **InLoox.**

Microsoft Outlook is a sophisticated software product that is underlies a continuous development process. Due to ongoing Office and security updates, Exchange Server service packs and new versions of Windows, there are a great variety of user scenarios in which InLoox software solutions can be used.

InLoox, Inc. develops and engineers the InLoox project management software solutions. Your project success is our priority and we greatly appreciate your feedback. Our customer's input inspires the continuous improvement of our software. The InLoox support team is happy to help you with technical issues that might arise and support you in finding the solution that best fits your business needs. We are happy to answer any project related questions you have.

NOTE Please have your InLoox account number handy when contacting the support team. This helps us to provide better and faster support to you. You can find the InLoox account name in the InLoox settings.

Internet: support.inloox.com

E-Mail: support@inloox.com

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Fax: +49 (0)89 358 99 88 - 99

Software error messages

We compiled a list of InLoox error messages that can pop up while working with the software, as well as recommended issue fixes and troubleshooting ideas.
If you are having difficulties finding a solution for technical issues that you come across, please contact the InLoox support team. Or you can browse our online knowledge base for user instructions and tutorial videos at www.inloox.com/support/.

Database errors

Error message	**Recommended solutions**
Connection to the InLoox database has been interrupted. The connection will be restored as soon as possible.	• Make sure that the network is accessible. • Check whether the offline configuration is set up correctly. • Contact the system administrator.
You are using InLoox On-Prem version X.X. The InLoox On-Prem database version is Y.Y. Please make sure that you are using a compatible product version or contact your system administrator.	The InLoox On-Prem client version you are using is not compatible with the database version on the server. Please update your InLoox On-Prem client version.

Software license errors

Error message	Recommended solution
The product key you entered is not valid in combination with your current InLoox client version.	The license key you entered is either only valid for an older InLoox version or for an updated version.
A license error has occurred. Please make sure you entered the correct license key or contact your system administrator.	The license key you entered is invalid for the InLoox version that is currently installed on your system. Please contact your system administrator for a valid license key.
The maximum number of user clients has already been reached. You can not use InLoox. Please make sure you entered the correct license key or contact your system administrator.	InLoox product keys are valid for the amount of user licenses you purchase. In this case, the number of available work station licenses has been exceeded. You can add new user licenses at any point.

Reporting errors

Error message	Recommended solution
The report template contains an error. An expression used in the template is incorrect. Please correct the report template.	Please review the report template, using the support documentation for the InLoox report designer.
The report contains no data. Empty reports cannot be created. Please edit the report template.	No project information has been entered into the report. **Tip** Please edit the respective template. The chapter Managing Report Templates and the support

	documentation for the InLoox report designer provide instructions on how to edit the template.
No printer is installed. Please install a printer to print reports.	A printer must be installed in order to print a report. Please install the required print driver. You'll find detailed information in the user manual of your printer.

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.

You can create a time tracking entry either directly in the project, or in the project overview:

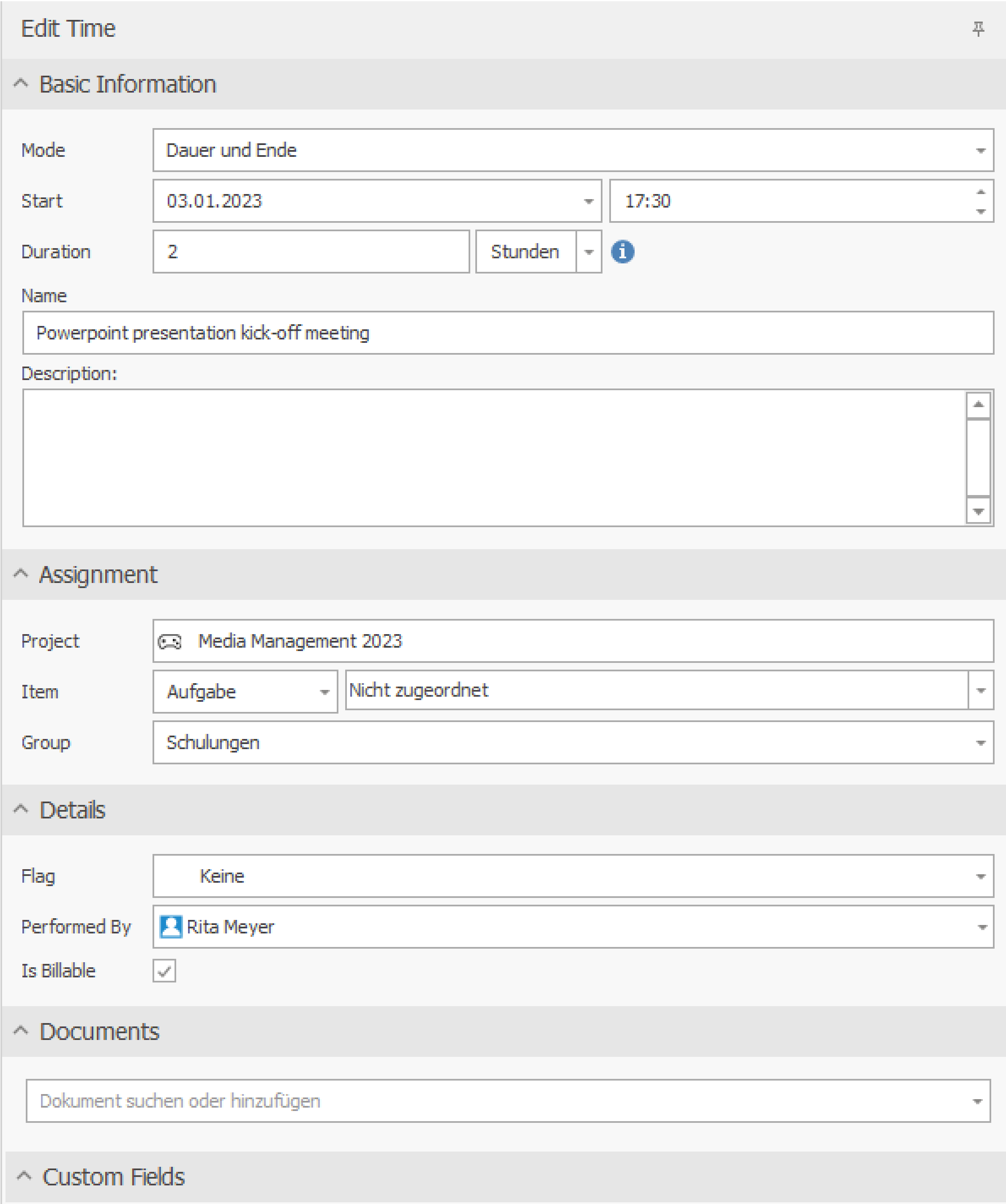
Create and edit time tracking entries within a project

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:



- **Basic Information:** Here you can choose between the modes **Started at, Ended at** or **Start and End.** Fill out the parameters accordingly. In addition, add the name and a brief description of the activity you were working on.
- **Assignment**: 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.
- **Documents:** Add additional documents, if needed.

5. When you have added all important facts, close the side panel by clicking on the **icon** next to **Basic Information** 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. Alternatively, click on the entry once and then on **Edit Time** on the right side. The side panel will open up again 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. Start on the project overview. Select **Time** from the bottom navigation to go to the time tracking.

2. This time tracking overview contains all time tracking entries of all projects.

3. In the **Start** tab click on **New time entry**, to create a new time tracking entry.

4. A dialog box **Edit Time** will open on the right. Add all information and follow the procedure that is described above in *Create and edit time tracking entries within a project*. Additionally, select the project to assign the new entry to a project.

5. When you have added all information, click on the **Save Button** in the upper right corner.

6. 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 Time** will open and you can edit the information of the entry. Afterwards click on the **Save Button** in the upper right corner.

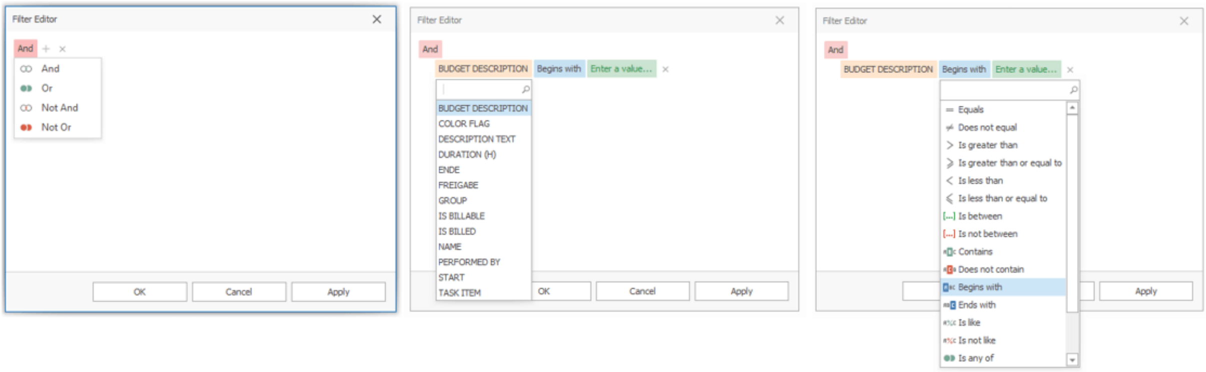
Customize time tracking views

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 …

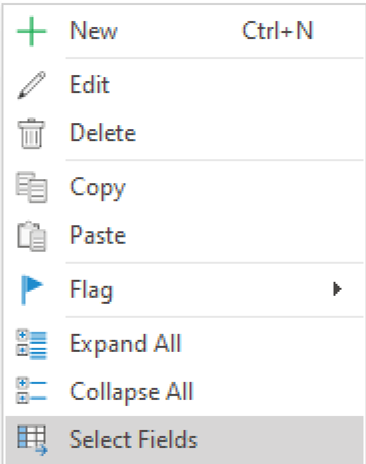
- … **Filter** on the **Start** tab. (time tracking overview over all projects)
- … **Edit Filter** on the **View** tab. (time tracking view within a project)



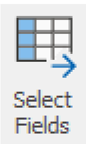
Costumize columns in the table view

In the time tracking views you can add various additional information by adding more column headings.

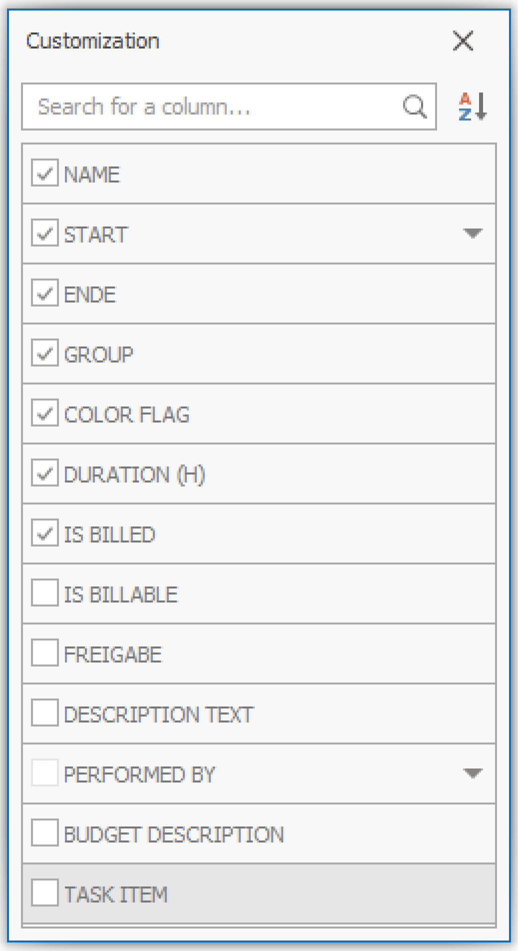
1. To add new column headings, either right-click and choose **Select fields,**



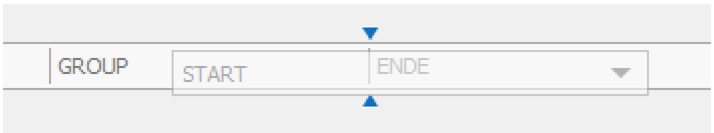
or navigate to **Select Fields** in the **View** tab.



2. A new dialog box that displays all available fields will open.



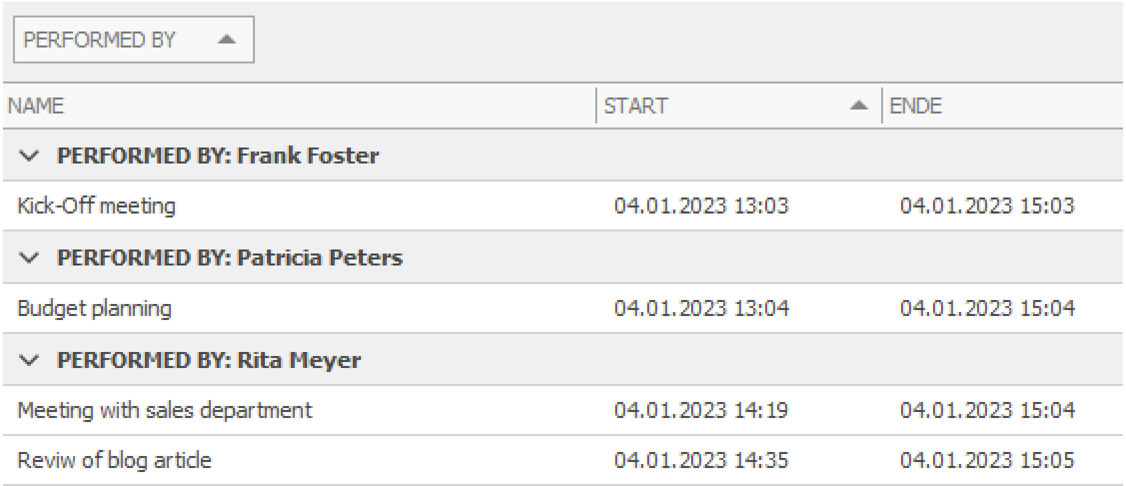
If you want to add one of the fields to your list, drag it to your preferred location in the list. Two arrows indicate the position of the new column.



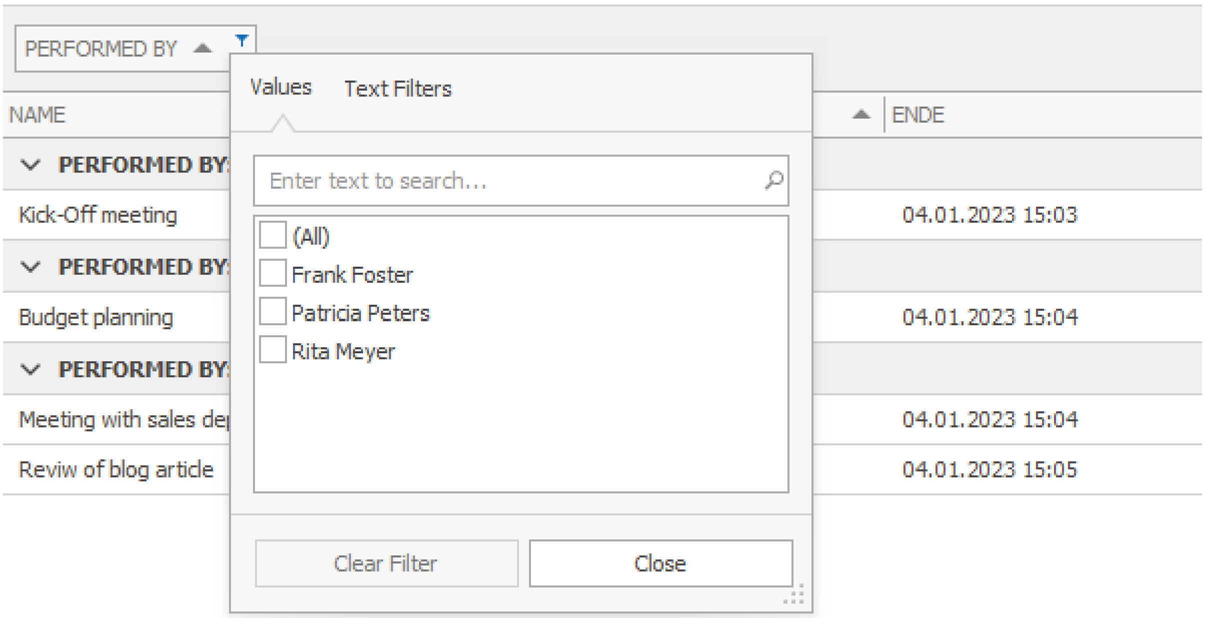
3. To delete a column heading from the list, drag the field back into the dialog box or into the empty area below the list.

Group feature

1. To group time tracking entries by a specific column, drag a column header into the field directly above the column headers. In this example, we group by the person who performed the task/time entry.



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, e.g. by certain values or date ranges.



Sort time tracking entries

You have the possibility to sort time tracking entries by column headings:

1. Click on the column heading.
2. Then click again to change the sorting order.

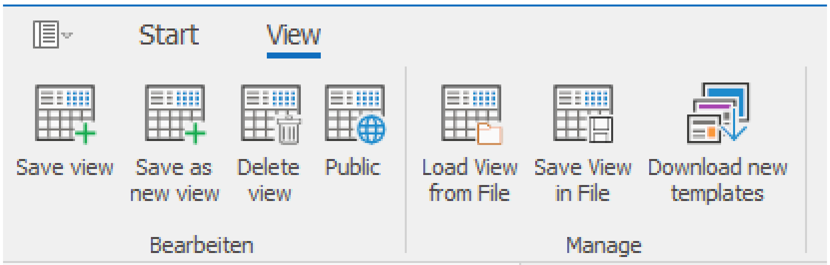
Save customized views

After you have customized your time tracking views regarding your personal needs, you can save those views for a later time.

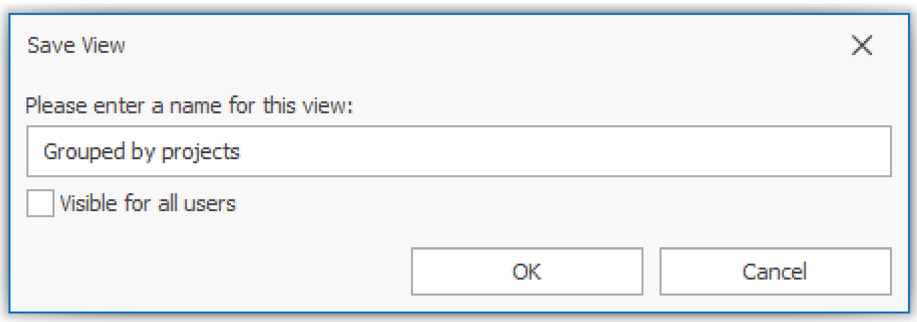
- The **time tracking view within a project** automatically saves your adjustments. When you are opening the project the next time, your customized view will be automatically displayed.
- In the time **tracking overview over all projects,** you can save your customized view well. In addition, you can make it accessible for other users by saving a customized view. 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. Start on the project overview. Select **Time** from the bottom navigation to go to the time tracking. The time tracking overview over all projects opens. Customize the view regarding your needs (For more information on that topic read *Customize time tracking views*).
2. To save the customized view, open the **View** tab and click on **Save view** or **Save as new 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.