



First steps with InLoox PM

Contents

Open InLoox PM for Outlook	2
InLoox PM for Outlook: overview	3
InLoox PM Web App: work in your browser	6
InLoox PM for Outlook: options	8
InLoox PM for Outlook options: assign licenses manually	8
InLoox PM for Outlook options: set permissions	9

InLoox PM is the locally installed project management solution by InLoox. You need your own server to host your project data. Please, find the **system requirements** [here](#). With your InLoox PM trial license, you may try InLoox PM for Outlook and InLoox PM Web App for 30 days with up to 4 more users.

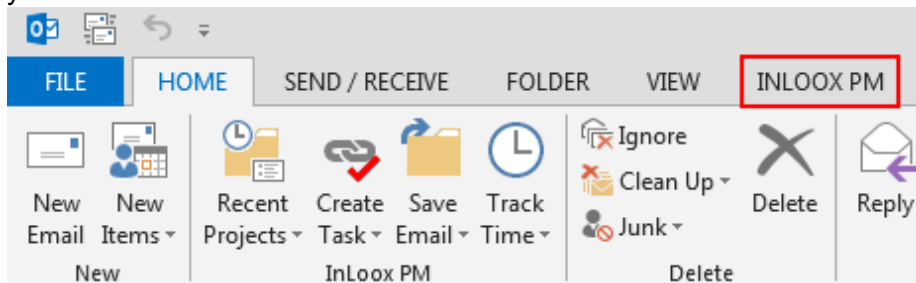
With InLoox PM for Outlook, you may access your project data from Microsoft Outlook. Alternatively, you may also use InLoox PM Web App to access your project data from your browser. Please, refer to our [website for the installation guides](#):

- *InLoox PM 9.x server installation guide*: **INSTALL THE SERVER FIRST!** This whitepaper guides you through the setup of the necessary server to host your project data locally and contains the guide to install InLoox PM Web App.
- *InLoox PM 9.x client installation guide*: This whitepaper guides you through the installation process of the InLoox PM for Outlook client.


IMPORTANT: The first steps described in this document may be carried out only after you have successfully set up the InLoox PM server and installed the InLoox PM for Outlook client and InLoox PM Web App client. This may require the assistance of your system administrator. Should you need assistance from us, please, [contact us directly](#).

Open InLoox PM for Outlook

1. Open your Microsoft Outlook. If you have installed the InLoox PM server and the InLoox PM for Outlook Client successfully, you will see the new **InLoox PM** tab in your Outlook ribbon.



Or

2. Open your Microsoft Outlook. In the lower left-hand corner, you find **Projects** . Click on it and Outlook opens the navigation panel on the left and displays the InLoox project list with three demo projects.

In case the InLoox menu is not clickable except for **Help**, please, login again with your user data:

1. In Microsoft Outlook, click on **File**.
2. There, click on **InLoox PM** and then on **Login** or on **Start set-up assistant**.
3. If you clicked on **Login**, enter your email address and enter your password.
4. If you started the set-up assistant, select **InLoox PM** and follow the instructions. You will need the connect.info-file of the InLoox PM Server.

InLoox PM for Outlook: overview

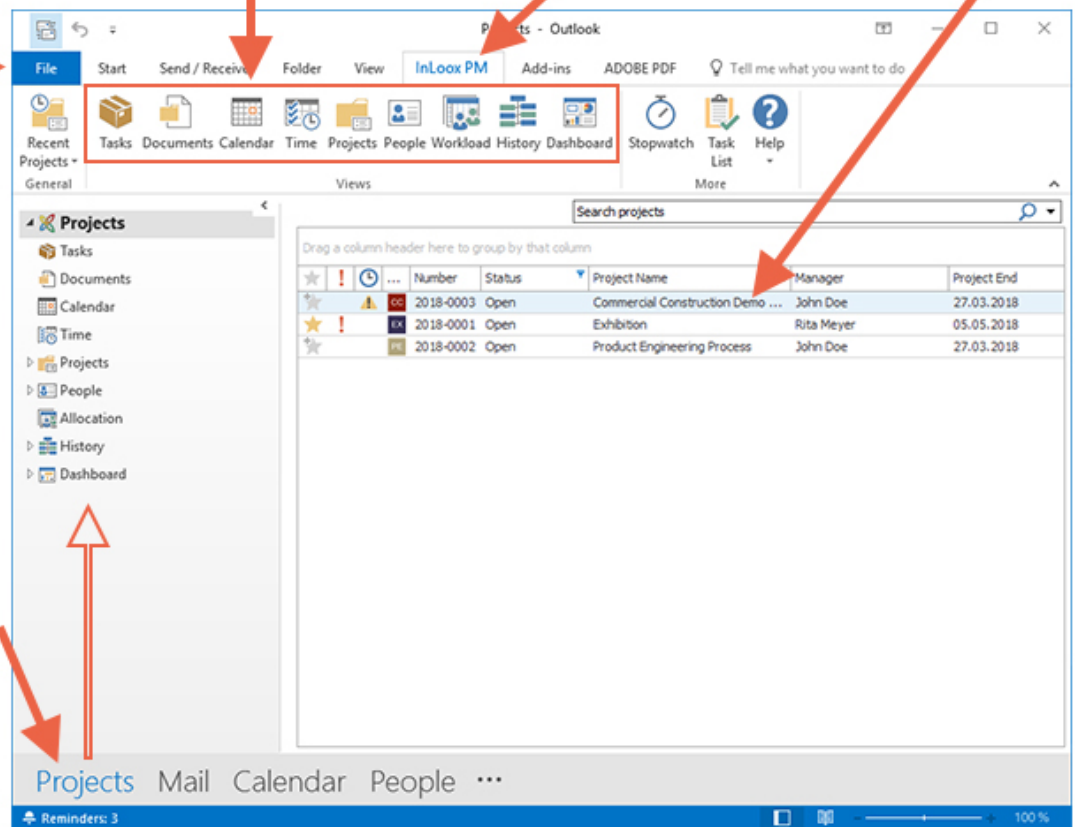
InLoox PM for Outlook makes team work, task and project management a lot easier. When you have set up the server and installed the InLoox PM Outlook Client, Microsoft Outlook opens automatically and redirects you to the InLoox project list, where you see three demo projects.

These are your multi-project features: **Tasks, Documents, Calendar, Time, Projects, Workload, History, and Dashboard** contain data from all your projects for which you at least have reading permissions.

The **InLoox PM** tab is added to your Outlook after the installation of the InLoox now! for Outlook exe-file.

Double-click on a project to open it in a separate window.

Click on **File** to access the **InLoox PM Options**.



The screenshot shows the Outlook interface with the following elements:

- Ribbon:** File, Start, Send / Receive, Folder, View, **InLoox PM**, Add-ins, ADOBE PDF, Tell me what you want to do.
- Recent Projects:** Tasks, Documents, Calendar, Time, Projects, People, Workload, History, Dashboard.
- Navigation Pane (Left):** Projects, Tasks, Documents, Calendar, Time, Projects, People, Allocation, History, Dashboard.
- Main Pane:** Search projects, Drag a column header here to group by that column.

Star	Alert	Clock	...	Number	Status	Project Name	Manager	Project End
★	!	🕒	...	2018-0003	Open	Commercial Construction Demo ...	John Doe	27.03.2018
★	!	🕒	...	2018-0001	Open	Exhibition	Rita Meyer	05.05.2018
★	!	🕒	...	2018-0002	Open	Product Engineering Process	John Doe	27.03.2018
- Bottom Bar:** Projects, Mail, Calendar, People, ...

After the installation of InLoox PM for Outlook, **Projects** is added to the navigation bar at the bottom of Microsoft Outlook. Click on it to open the InLoox PM navigation bar on the left.

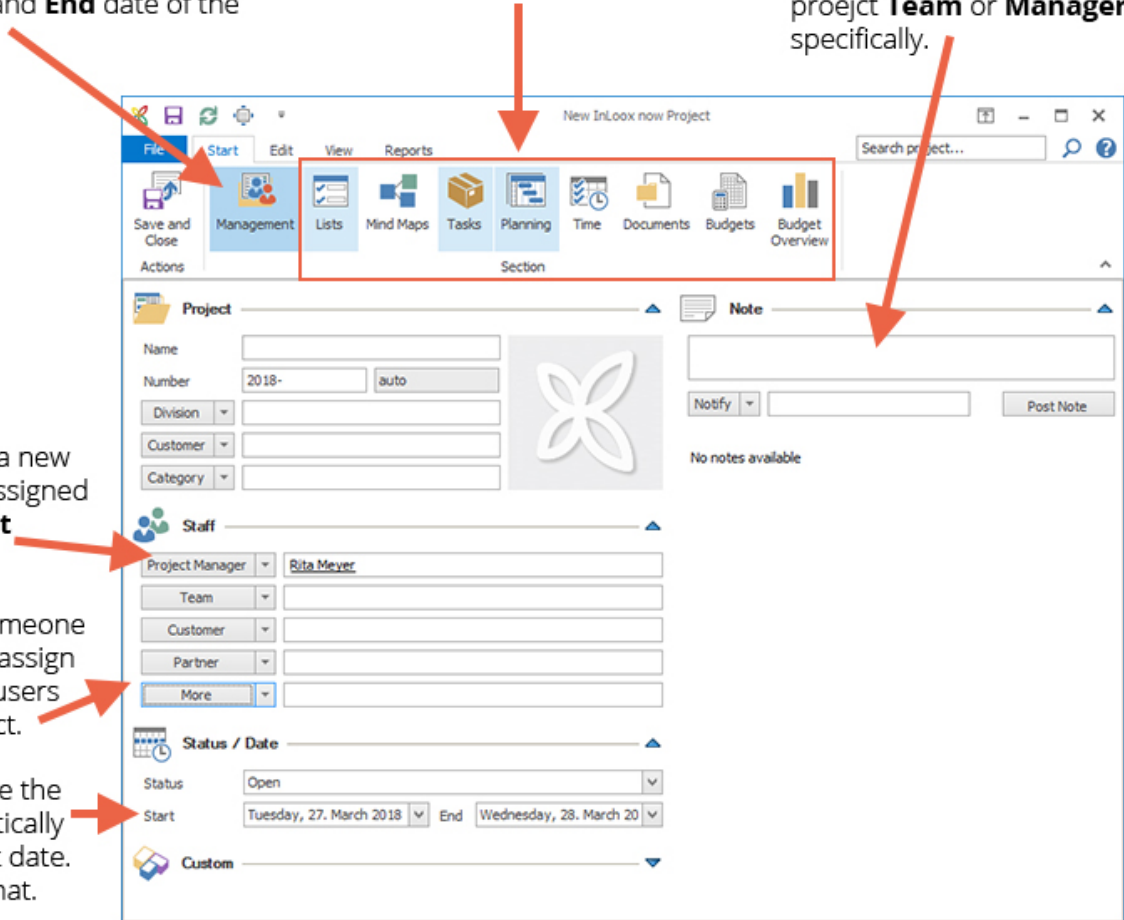
Generally, we differentiate between multi-project functionalities, where you see all the data from every project you have access to, and single-project functionalities, where you only work in one project.

If, e.g. you have two personal projects and work in further four projects as a team member, you will see six projects in the project list.

When you create a new project, you start on the **Management** page where you enter all relevant details such as **Name**, **Staff** assigned to this project or **Start** and **End** date of the project.

Navigate to the project's **Lists**, **Mind Maps**, **Tasks**, **Planning**, **Time** entries, **Documents**, or **Budgets** and the **Budget Overview**.

Post **Notes** to share information about this project. Use the **Notify** feature to alert e.g. the project **Team** or **Manager** specifically.



When you create a new project, you are assigned the role of **Project Manager**.

You can assign someone else this role and assign other InLoox PM users roles in this project.

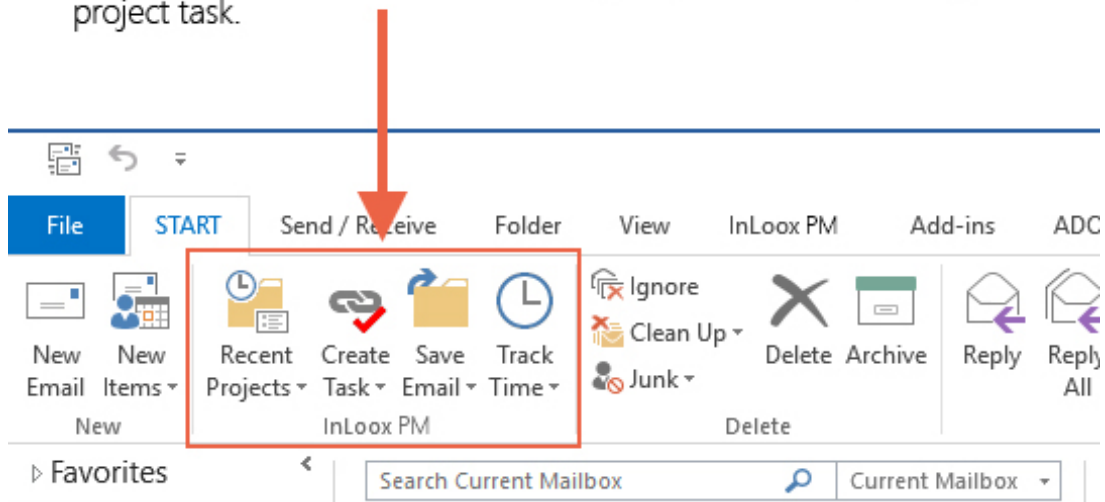
The day you create the project is automatically taken for the start date. You can change that.

When you create a new project, or open an existing project, you are directed to this project's **Management** site. There, you enter all relevant project details such as **Name**, **Start** and **End** date and assign your work colleagues to the available project roles. Only the project's name is a mandatory field.

Then you can start [planning](#) your project or creating your project's [tasks](#). Alternatively, you can also start with a [mind map](#).

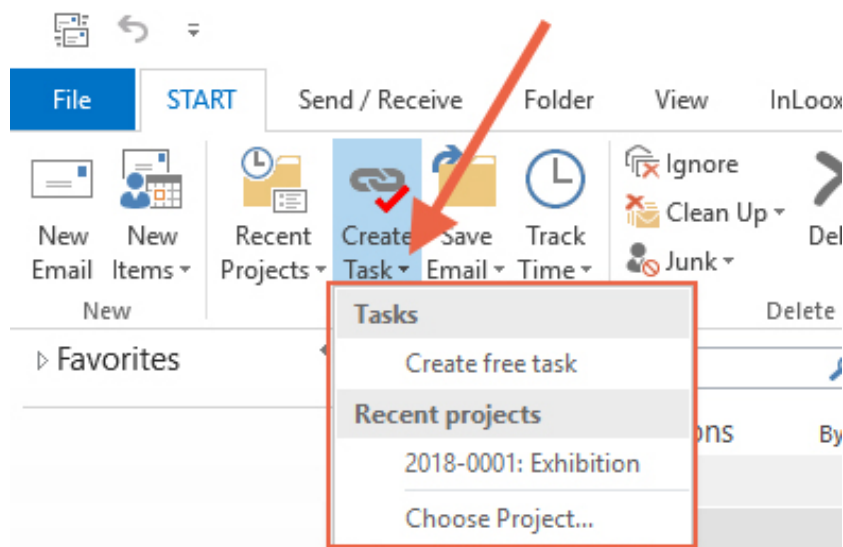
The Outlook-integration of InLoox enables you to use your emails, calendar dates or meeting-requests and your contacts for your task and project management in InLoox:

When you have installed InLoox PM for Outlook, your Outlook is enhanced with very practical InLoox features: you can quickly access **Recent Projects**, **Create a Task** e.g. from an email, **Save an Email** as a document or **Track Time** you spent working on a specific project task.



You can create a task from your Outlook email. Simply click on the email and then click on **Create Task** in the ribbon. Either assign the task to a project or create a personal **free task**, that is not assigned to a specific project.

For further details on how the Outlook integration makes your daily work and project management a lot easier, please refer to our [online help](#).

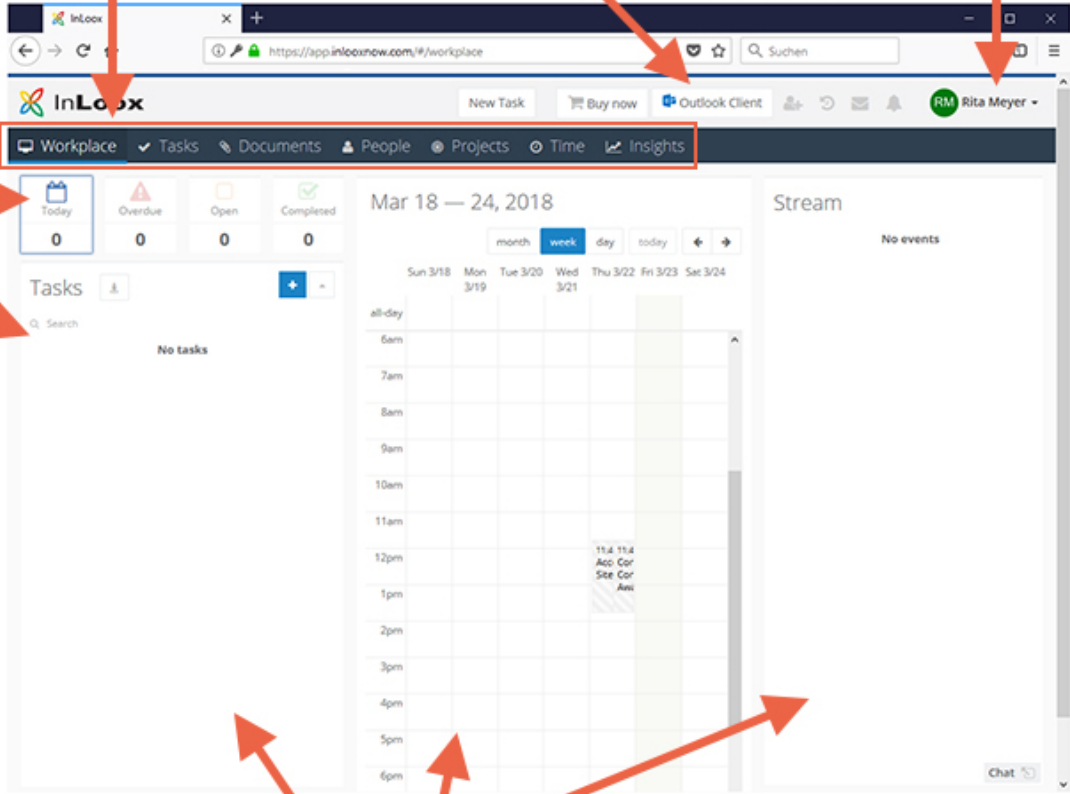


InLoox PM Web App: work in your browser

With InLoox PM Web App you can work in your preferred browser and access your project data e.g. on the go on a tablet. After your 30-day trial period, you either have to purchase InLoox PM Universal User licenses or InLoox PM Web App licenses.

The step-by-step guide *InLoox PM 9.x server installation guide* shows you, how to install InLoox PM Web App. Please, download the guide from our [website](#).

This is a quick overview of the features in InLoox PM Web App:



Next to the **Workplace**, the ribbon shows you the multi-project management areas. In Advanced Mode, you can access **Time** and **Insights**, too.

Download the **Outlook-Client** exe-file here.

Click on your name to access your **Profile**, change your **Password**, access the **InLoox Options** and change the **Mode**.

Tasks are grouped by their status and displayed in the task list.

Create a new task by clicking **+** or hitting the **New Task** button in the ribbon.


Tasks with your own personal & project-related tasks.
Calendar with project milestones and project tasks.
Stream with chat messages and project notes.

Use the **Chat** to communicate with colleagues & send pictures and documents.

Generally, we distinguish between the features you use for multi-project and task management, where you see all relevant data from every project you have a role in and every personal task (not assigned to a project), and single-project management functionalities where you work on one specific project. You start in the **Workplace**, which is an overview of your assigned tasks, your schedule and messages.

Use the ribbon to navigate in InLoox now! Web App.

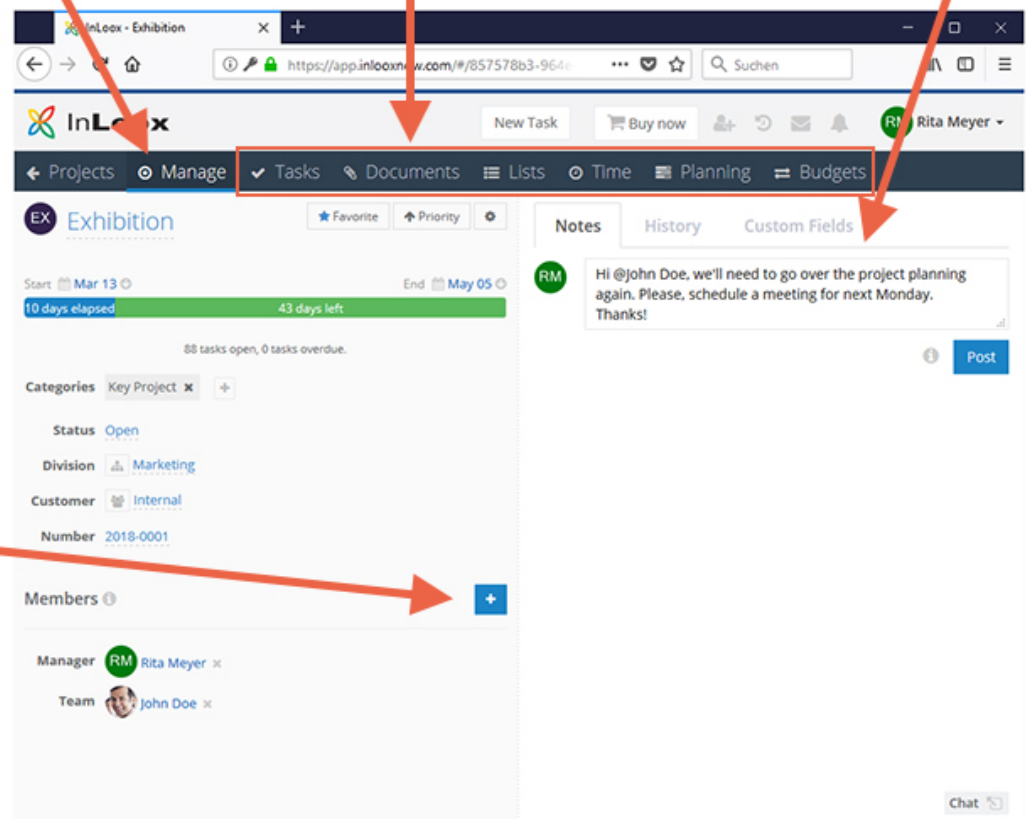
You can switch between **Simple Mode** and **Advanced Mode** to display further features such as **Time** and **Insights**, and **Budgets** in a project. Click on your name in the upper right-hand corner to switch between these two modes.


In the ribbon, click on **Projects**. There you find three demo-projects in the project list. Click  to create a new project.

Each project has a **Manage** page, where you enter all relevant details, e.g. **Status**, **Start** and **End** date, the **Division** or **Customer**.

Navigate within the project to **Tasks**, **Documents**, **Lists**, **Time** entries, **Planning** and **Budgets**. They contain only data from this project.

On the right, you see this project's **Notes**, the **History** displays all changes to this project. **Custom Fields** have to be defined in the options first.



Add colleagues to your project by clicking  and assigning them a role, e.g. **Team**.

If you create the project, you are the **Manager**. You can assign another user to this role.

You find more detailed descriptions of all the [features of InLoox Web App on our Website](#).

InLoox PM for Outlook: options

During your 30-day trial period, you may be the administrator of the InLoox PM licenses. As admin, you can access the InLoox options from InLoox PM for Outlook and customize InLoox to your needs.


1. Open Microsoft Outlook and click on **File**.
2. On the left, you find the **InLoox Options** . Click to open them in a new window.

If you are not the admin, you may only access the InLoox PM language settings.

InLoox PM for Outlook options: assign licenses manually

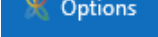
If you are the admin of InLoox PM, you can access the InLoox options and assign the InLoox PM licenses manually. During your 30-day trial you have 5 InLoox PM Universal User Licenses that allow you and your colleagues to access your project data from InLoox PM for Outlook and InLoox PM Web App.

By default, InLoox PM distributes the available licenses automatically. That means that they are distributed on a first-come-first-serve-basis. If you want to control manually, who in your team or company gets an InLoox PM license, you need to deactivate the automatic distribution:

1. Open Microsoft Outlook, click on **File**, and then open the **InLoox Options** .
2. On the left, click on **License keys** and on **User licenses**.
3. On the right, the *Automatic user license assignment* is activated by default. Deactivated by clicking into to the box to remove the checkmark.
4. To assign a license anew, click on **New**.
5. In the window *New user license*, click on the arrow next to the field **Name** and e.g. select **Exchange user**, if you use Microsoft Exchange, or select **InLoox User**, and choose the person you want to assign the InLoox PM license to.
6. Confirm your choice with **OK**.
7. Now, you can also choose the type of license you want to assign if you have different licenses. During your 30-day trial period, you only have 5 InLoox PM Universal User licenses.

After assigning the license manually to a person, [set the permissions](#) for this person.

In case a team member is leaving, you can reassign this free license to someone else:

1. Open Microsoft Outlook, click on **File** and open the InLoox options .
2. Click on **License Key** and on **User Licenses**.
3. Select the person whose license you want to reassign and then click on **Delete**.
4. InLoox will ask for your confirmation. Click on **Yes**.
8. Now, you can reassign this license. Click on **New**.
5. In the window *New User License* click on the arrow next to field **Name** and select **InLoox user**. Select the person and confirm with **OK**.


6. Now, you can also choose the type of license you want to assign if you have different licenses. During your 30-day trial period, you only have 5 InLoox PM Universal User licenses.

After assigning the license manually to a person, [set the permissions](#) for this person.

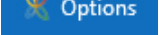
InLoox PM for Outlook options: set permissions

If you are the admin of the InLoox PM licenses, you can access the InLoox options and set the user based and role based permissions for InLoox PM.

Set **user based permissions** in InLoox PM for Outlook:

1. Open Microsoft Outlook, click on **File**, and then on **InLoox Options** .
2. On the left, click on **Permissions**. On the right you see the **User based permissions**.
3. Click on **New**.
4. In the window Permissions select the user for whom you want to set the permissions either from your **Active Directory**, **Microsoft Exchange** account or **InLoox user**. Confirm your selection by clicking **OK**.
5. On the right, tick the upper box if you want to give this user every available permission for every InLoox PM feature. Or set each permission individually. You can change these settings any time.
6. Confirm these setting by clicking **OK**.

Role based permissions are only acquired by users when they assume one of the 6 roles in a project (Manager, Team, Partner, Customer, More, Reviewer):

1. Open Microsoft Outlook, click on **File**, and then on **InLoox Options** .
2. On the left, click on **Permissions**. On the right you see the **Role based permissions** right under the user based permissions.
3. If, e.g. you want to change the permissions of the role **Manager**, select the role and click on **Edit**.
4. Set the permissions you want the role to have by clicking into the respective checkboxes.
5. Confirm your settings by clicking **OK**.

Generally, InLoox PM combines user based and role based permissions. The following example of Max Schiller, who works in accounting, illustrates that:

- The role “Team” has the permission to “edit projects” including “add project notes”, “edit lists”, “edit mind maps”, and “edit tasks”.
- The InLoox now! user Max Schiller is permitted to only “read projects” and to only “read and edit budgets”.
- The user Max Schiller has been added to the project *Product Development* in the role of “Team”.
- There are three more projects in progress, but the user Max Schiller is not involved in any of them.

According to this set of role based and user based permissions, the following is true for Max Schiller:

- Max Schiller may read and edit the project *Product Development*, including adding project notes and editing lists, mind maps, and tasks.
- Additionally, he may read and edit the budget in the project *Product Development*.
- Max Schiller may do this in every other project where he is added in the role of “Team”.
- Max Schiller is, however, not permitted to edit anything other than the budgets in the three other projects where he is not added in the role of *Team*. He may only read these projects, as his user permission allows him only to do that and prevents him from editing any project data other than budgets.

For more details on user-based and role-based permissions, please, refer to our [online help](#) on our website.

If you have any further questions, need assistance or want to schedule a free online demo, please, contact us. We are happy to help you.

Please, contact your personal InLoox sales representative. You find the contact details in the confirmation email you received after you created your InLoox now! trial account.

Alternatively, you may reach us by email office.sf@inloox.com.

Should you need technical assistance, please, go to our website to send us a [support ticket](#).