



InLoox 11 for Outlook InLoox 11 for Windows

Migration Setup Guide for InLoox 10 to InLoox 11

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

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General Information

The current version of InLoox is fundamentally different from predecessor generations of the product. Numerous innovations were realized together with customers and partners. Supported database management systems with network usage are Microsoft SQL Server (all versions and editions from 2016).

The database schema of InLoox is ready for clustering usage.

InLoox 11 is internationalized and is on hand in different language versions. Region and language settings are supported for each user location. Thus, the foundations for a global usage are laid.

If you have worked with InLoox 10 before, please note that installing InLoox 11 upgrades the existing database schema automatically to version 11. This could lead to issues concerning your InLoox Licenses. You cannot undo this migration. Please backup your InLoox 10 database before upgrading to InLoox 11. Please do not hesitate to contact your InLoox contact.

System Requirements

Server

The hard- and software requirements depend on the used database system. Please consult the product documentation of the respective manufacturer for valid requirements.

Microsoft offers a free database product:

- Microsoft SQL Server Express Edition

For the installation of InLoox 11 the following roles and features of IIS (Internet Information Services) are necessary. Please be aware that the names can vary depending on the operating system that you are using.

- Internet Information Services
 - o Common HTTP Features
 - Default Document
 - Directory Browsing
 - HTTP Errors
 - HTTP Redirection
 - o Performance Features
 - Dynamic Content Compression
 - Static Content Compression
 - o Security
 - Basic Authentication
 - Request Filtering
 - Windows-Authentication
 - o Application Development features
 - .NET-Extensibility 4.5
 - ASP
 - ASP.NET 4.5
 - ISAPI-Extensions
 - ISAPI-Filters
 - WebSocket-Protocol
- Web Management Tools
 - o IIS Management Console
 - o IIS Scripting Tools
- IIS Management Console

Additionally needed:

- [ASP.NET 6 Hosting Bundle](#)
- A SMTP Server
- A valid SSL certificate for your used URL
- Either a domain user (for data server) or an Azure App (for SharePoint Online, see step 9)

Client

For the installation Windows 10 or higher is required. You will also need Microsoft Office from Version 2016 or higher.

The system requirements are dependent to the used versions.

InLoox automatically installs Microsoft .NET 6 Desktop Runtime as system requirement.

Upgrade / Migration of existing projects

Upgrade from older versions

A direct upgrade from older versions (InLoox 9.x or older) is not possible. You will have to update the database to version 10.x first. You can find a detailed guide at:<https://www.inloox.com/products/documents/>

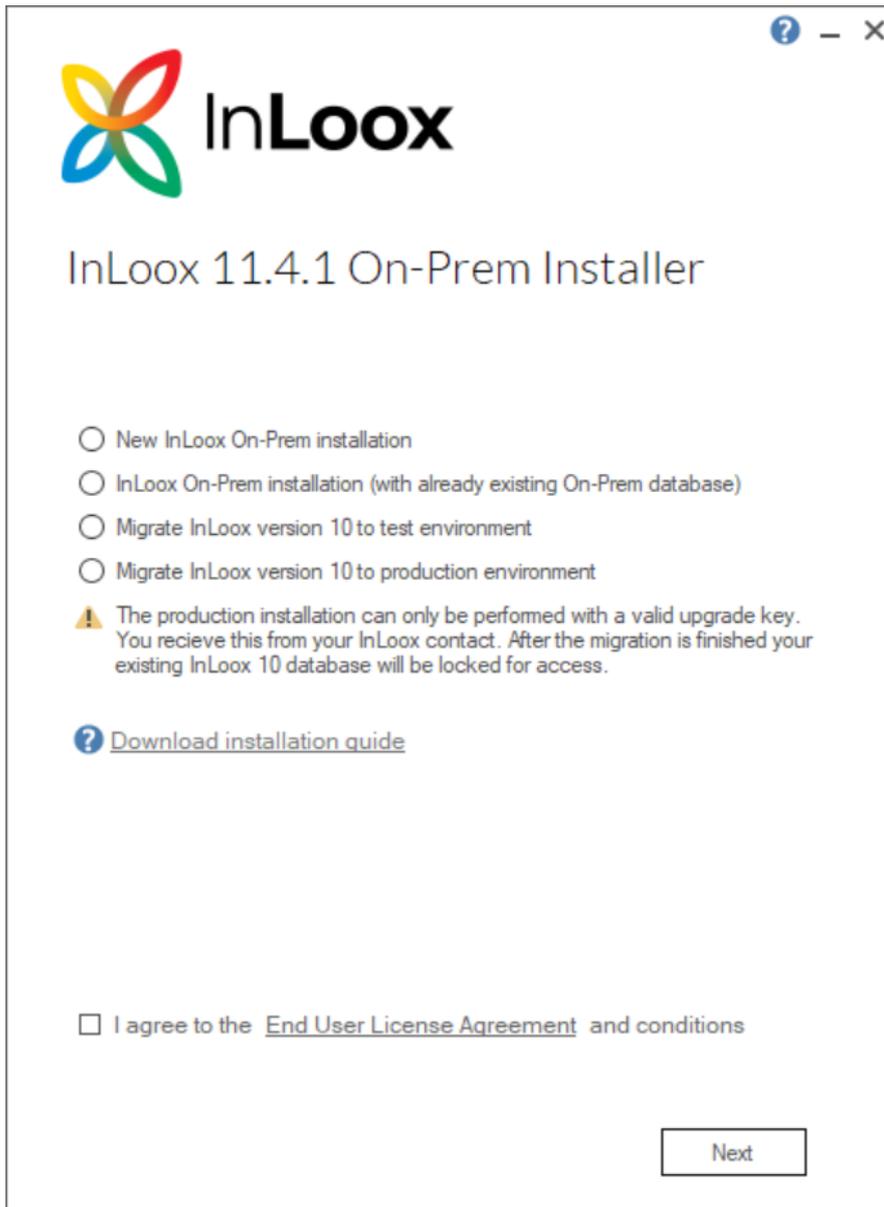
Upgrade from InLoox 10.x

Please create a backup of the current database.

The database can be upgraded with the Server Installation Package.

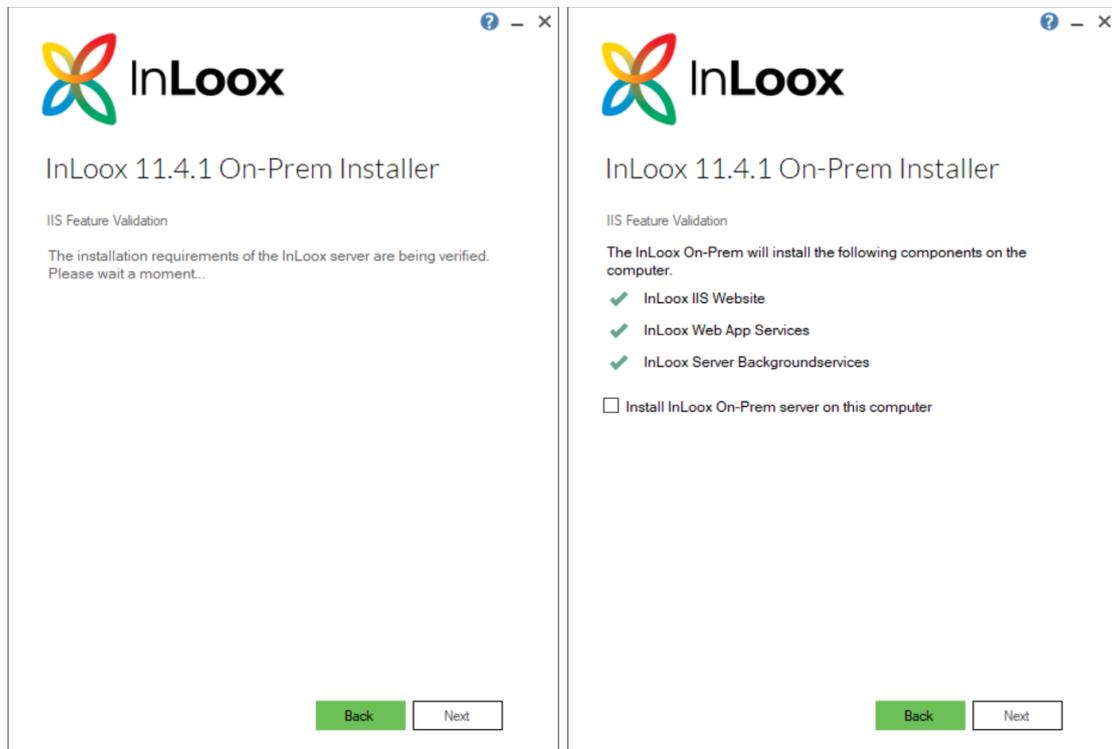
Important note: Please install the database server first. For the requirements go to **System Requirements in this document**. InLoox supports Microsoft SQL server which brings a product for free, that can be installed within a few minutes. (MSSQL Express Edition).

1. Run **InLoox_OnPrem_Server_11xx.exe**



Select **Migrate InLoox version 10 to production environment** and check **I agree to the End User License Agreement and conditions**, then click on **Next**.

- Depending on your operating system settings the dialog for **user account control** appears. Click on **Yes**. Now the setup checks if all required IIS Features and Roles are installed properly. If this is not the case, you need to repeat the installation of these (see System Requirements).



- Check **Install InLoox On-Prem server on this** computer and click **Next**

4. Enter the endpoint for InLoox. With this URL InLoox is available in your company. Next choose the port for the application and the corresponding certificate for TLS Encryption. Is this an invalid certificate you will get the corresponding error message and the setup cannot be finished (see image 1). Click on **Next**.

InLoox 11.4.1 On-Prem Installer

InLoox Web App

Please input the public endpoint for the site:

URL: https://inloox-inc.com

Please select the mode for the HTTPS/SSL encryption:

Direct HTTPS/SSL encryption

HTTPS/SSL encryption via reverse proxy

Please select a port for the secure connection:

Standard-Port TLS/HTTPS (443)

Other port:

Please select certificate for the TLS encryption:

Show certificate

Back Next

You can change the URL afterwards (see configuration mode).

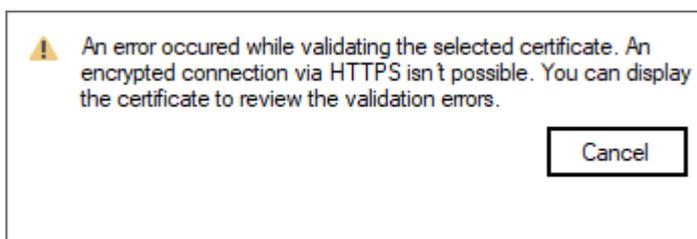


Image 1: error message with invalid SSL certificate

5. Enter the **server name** and the **database name** for your InLoox database. The database name will automatically be used as prefix for the separate databases.

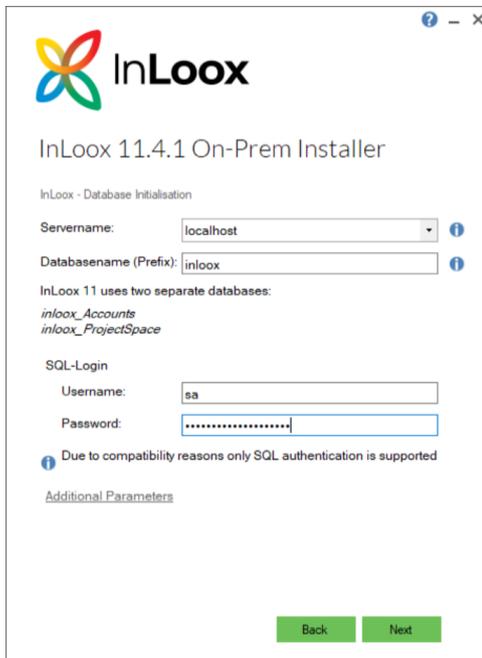
Example:

Database name (prefix):Datenbankname (Präfix): inloox_younameit

→ inloox_younameit_Accounts

→ inloox_younameit_ProjectSpace

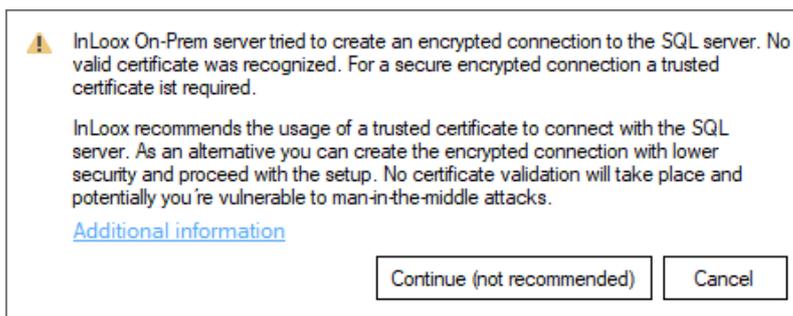
6. Enter the **SQL Login**.



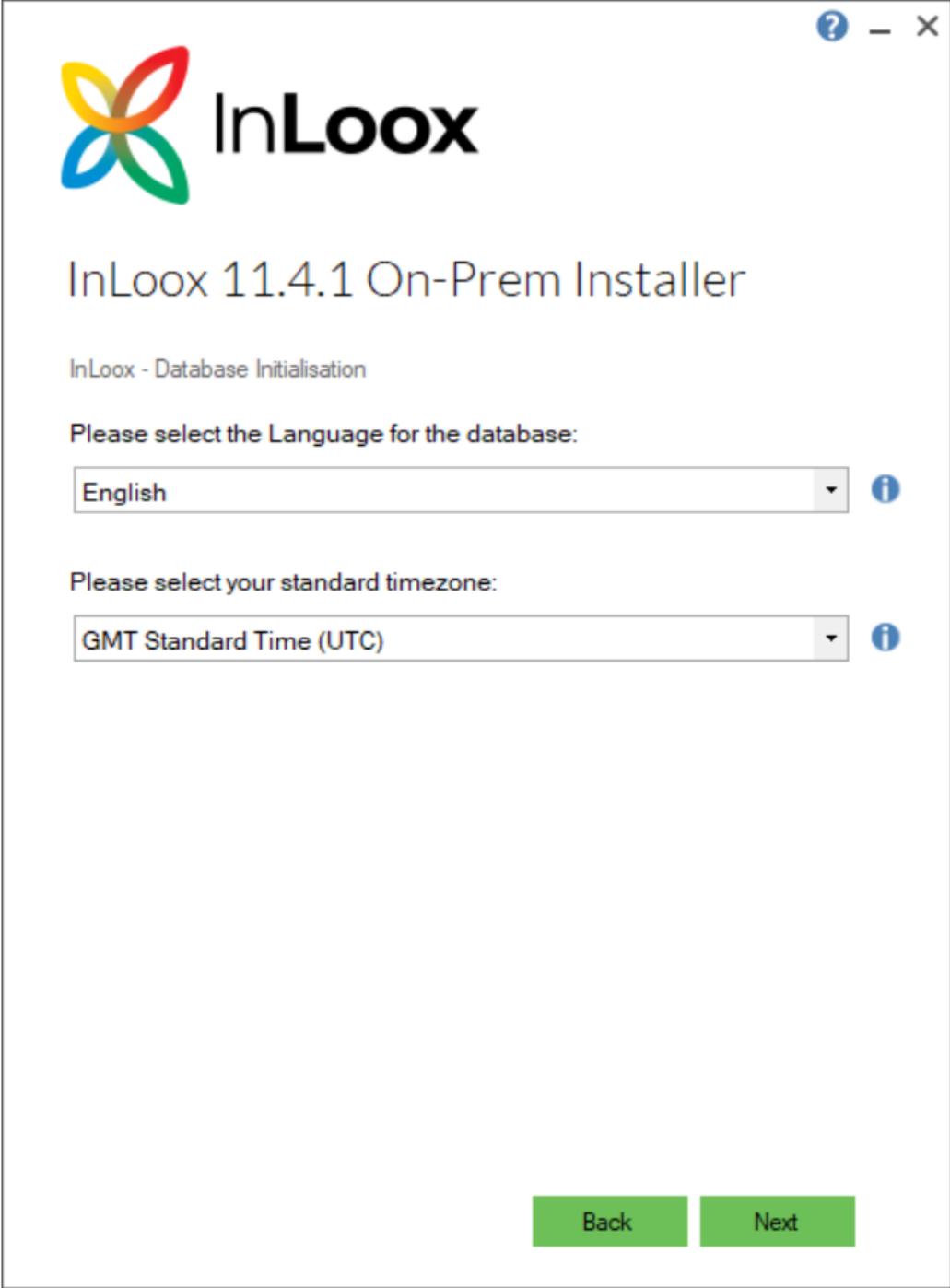
Important note: InLoox 11 only allows SQL authentication and no windows authentication. That is because InLoox uses a couple of services which had to be allowed for each user withing windows authentication. Therefore, the SQL User is used as centralized endpoint for these services. During the installation this user must have „db_creator“ permission. Afterwards you can remove this permission.

7. Click on **Next**. The installing routine now checks the entered data due to correctness and if the server is available. This routine can last up to a few minutes.

Important note: If the used certificate is not suitable for an encrypted connection to the SQL server you will see a warning message. Microsoft recommends SQL connections with encryption (e.g. HTTPS). Because of compatibility InLoox allows the connection without validating the certificate. InLoox recommends to cancel here and use a valid certificate for the SQL server. Afterwards you can continue the setup. You can find up-to-date information at [Microsoft Documentation](#)



8. Select the database language and the time zone. Click on **Next**.



The screenshot shows a window titled "InLoox 11.4.1 On-Prem Installer" with the InLoox logo at the top left. Below the logo, the text "InLoox - Database Initialisation" is displayed. The main content area contains two selection prompts:

Please select the Language for the database:

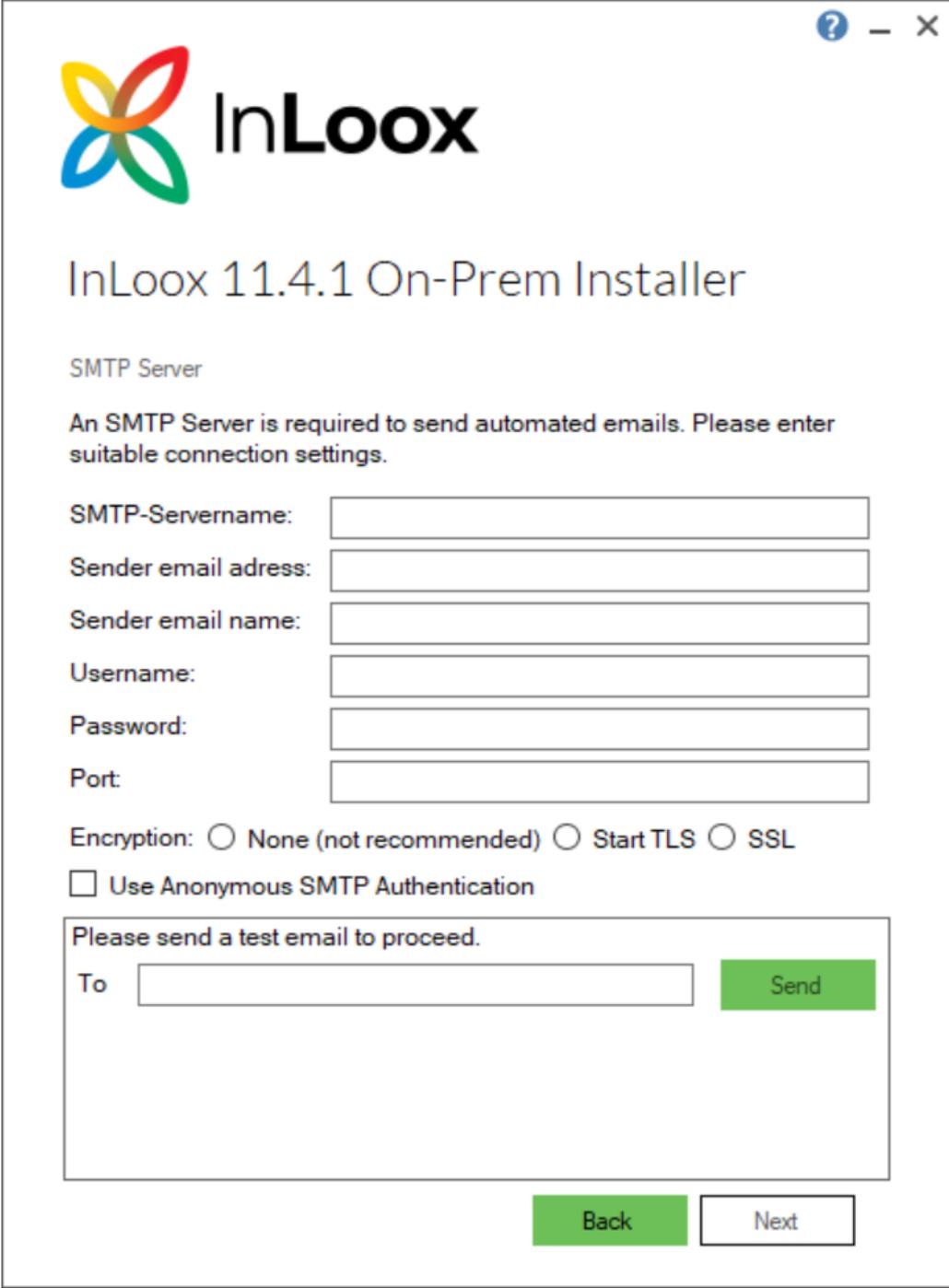
English

Please select your standard timezone:

GMT Standard Time (UTC)

At the bottom of the window, there are two green buttons: "Back" and "Next".

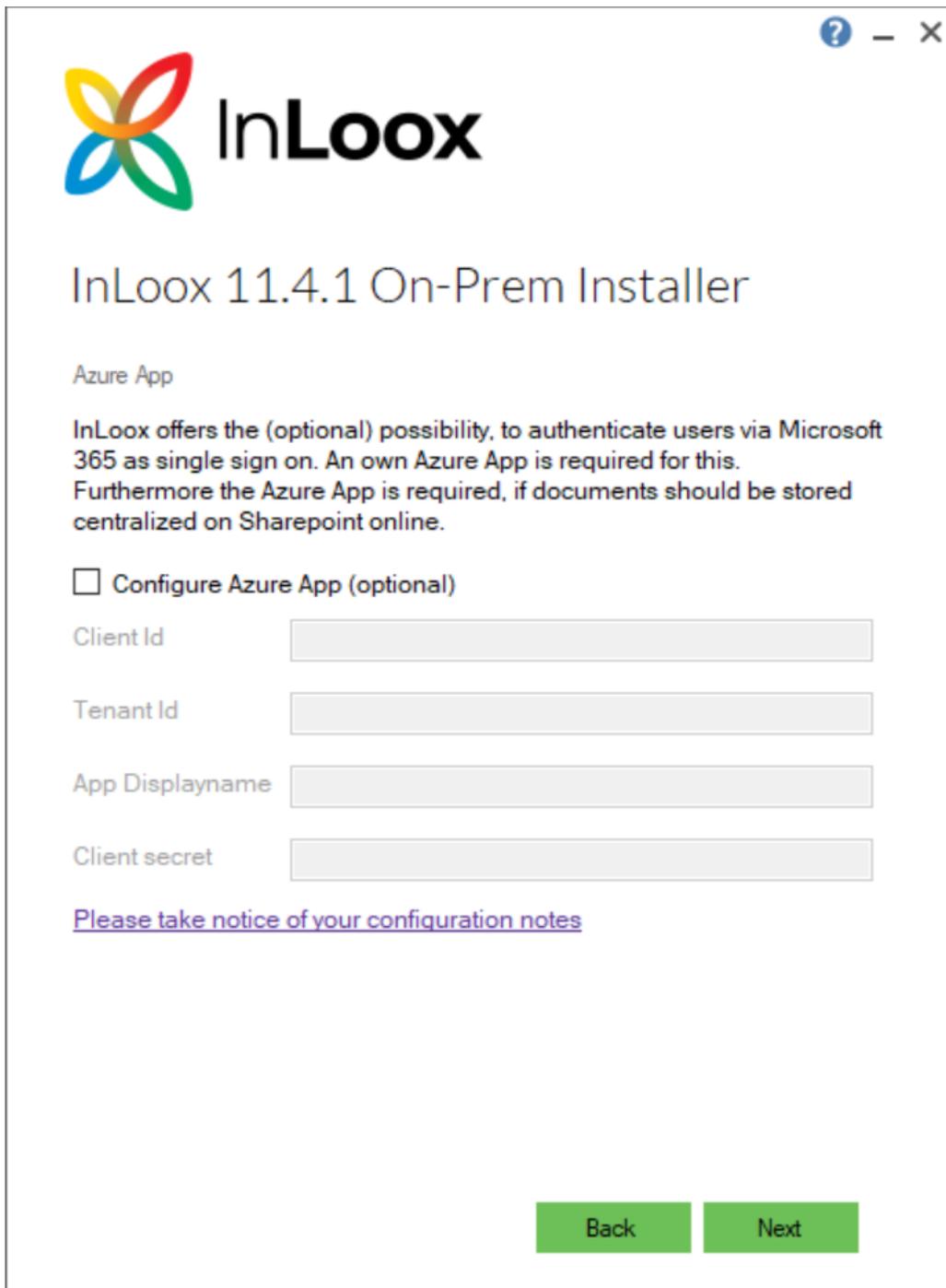
9. Enter your **SMTP Server data**. SMTP is used for automatic notifications (e.g. invitations and notifications).



The screenshot shows the InLoox 11.4.1 On-Prem Installer window. At the top left is the InLoox logo, a colorful four-petaled flower. The title bar shows a question mark, a minus sign, and a close button. The main title is "InLoox 11.4.1 On-Prem Installer". Below it, the section is titled "SMTP Server". A message states: "An SMTP Server is required to send automated emails. Please enter suitable connection settings." There are seven input fields: "SMTP-Servername:", "Sender email adress:", "Sender email name:", "Username:", "Password:", and "Port:". Below these are three radio buttons for "Encryption": "None (not recommended)", "Start TLS", and "SSL". There is also a checkbox for "Use Anonymous SMTP Authentication". A section titled "Please send a test email to proceed." contains a "To" label, an input field, and a green "Send" button. At the bottom are two buttons: a green "Back" button and a white "Next" button.

Click **Send** to generate a test email. With a successful test you will see a positive notification and will receive an email at the entered email address. Click on **Next**.

10. You can use InLoox with Microsoft 365 via Single Sign-On. Therefore you will need an **Azure App** that will be configured now. The Azure App is also required if you want to use Microsoft SharePoint Online for your documents (see next step). This is optional.



 **InLoox**

InLoox 11.4.1 On-Prem Installer

Azure App

InLoox offers the (optional) possibility, to authenticate users via Microsoft 365 as single sign on. An own Azure App is required for this. Furthermore the Azure App is required, if documents should be stored centralized on Sharepoint online.

Configure Azure App (optional)

Client Id

Tenant Id

App Displayname

Client secret

[Please take notice of your configuration notes](#)

Click on Next.

11. Select a destination for your documents and enter the corresponding data. You can choose between a file server and SharePoint Online. The latter is only possible if you configured an Azure App beforehand.

The image displays two side-by-side screenshots of the InLoox 11.4.1 On-Prem Installer. Both windows feature the InLoox logo at the top left and the title 'InLoox 11.4.1 On-Prem Installer'.

The left window shows the 'File storage' section with the following configuration:

- Radio button selected: Storage on fileserver
- Radio button unselected: Storage on Sharepoint online
- Serverpath in UNC-format ("\\servername\share"): C:\Projects
- Domain of user: (empty)
- Username: inloox
- Password: (masked with dots)
- A 'Test' button is visible next to the instruction 'Please test your settings to proceed.'

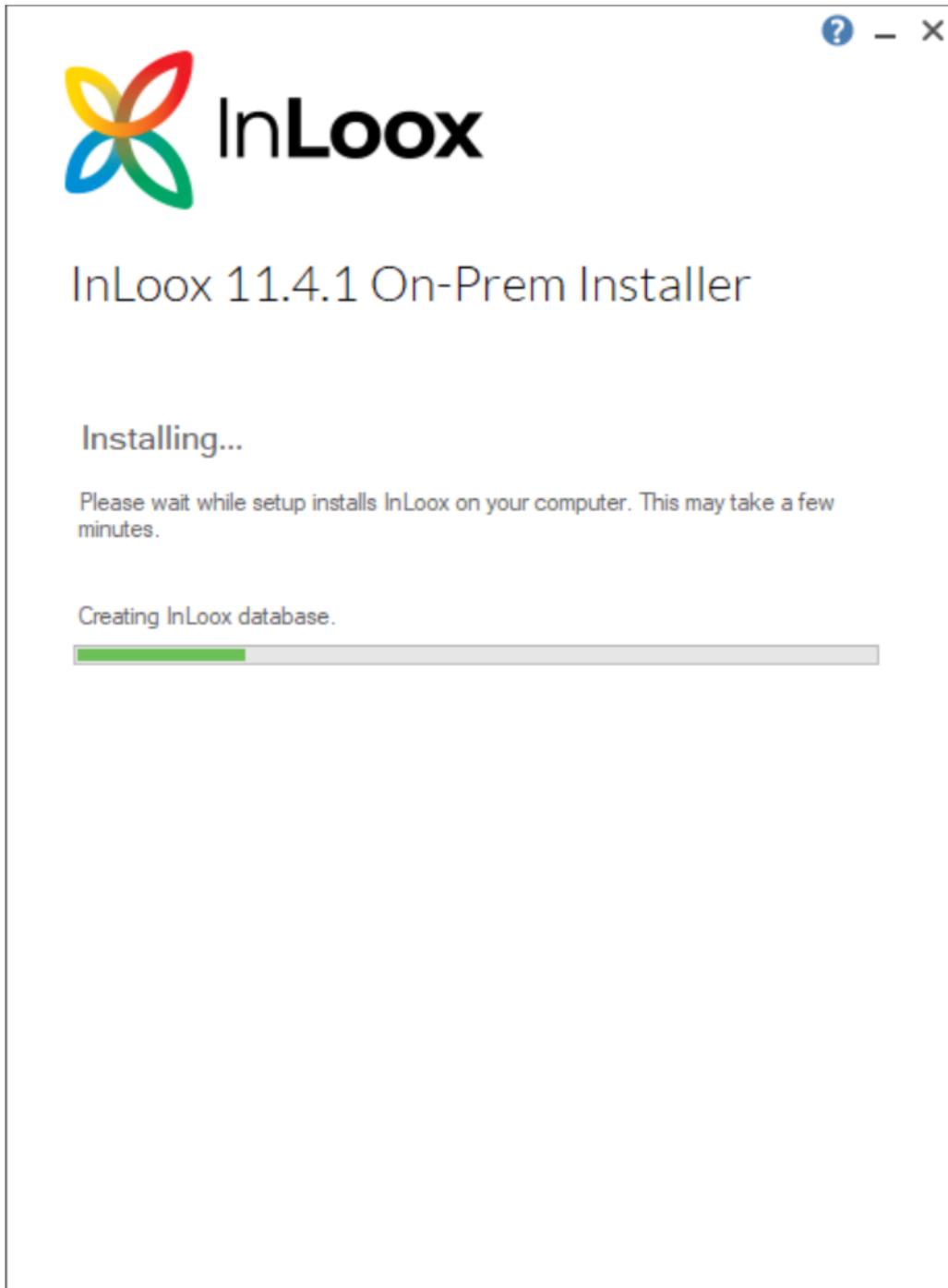
The right window shows the 'File storage' section with the following configuration:

- Radio button unselected: Storage on fileserver
- Radio button selected: Storage on Sharepoint online
- Sharepoint online URL: inloox-inc.sharepointonline.com

Both windows have 'Back' and 'Next' buttons at the bottom.

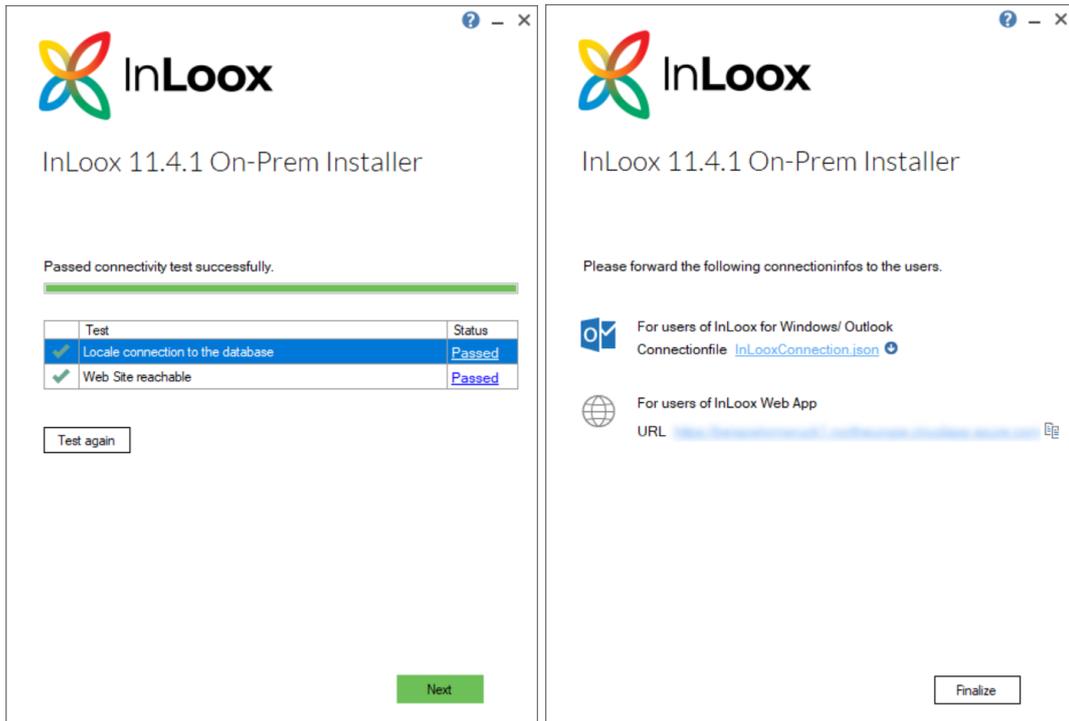
Click on **Test**. If the server path is valid, click **Next**.

12. The databases will now be created/initialized.



Depending on your operating system configuration, the **user account control** appears. Click **Yes**.

13. After installing the software an automatic test will check the database and the configured website.



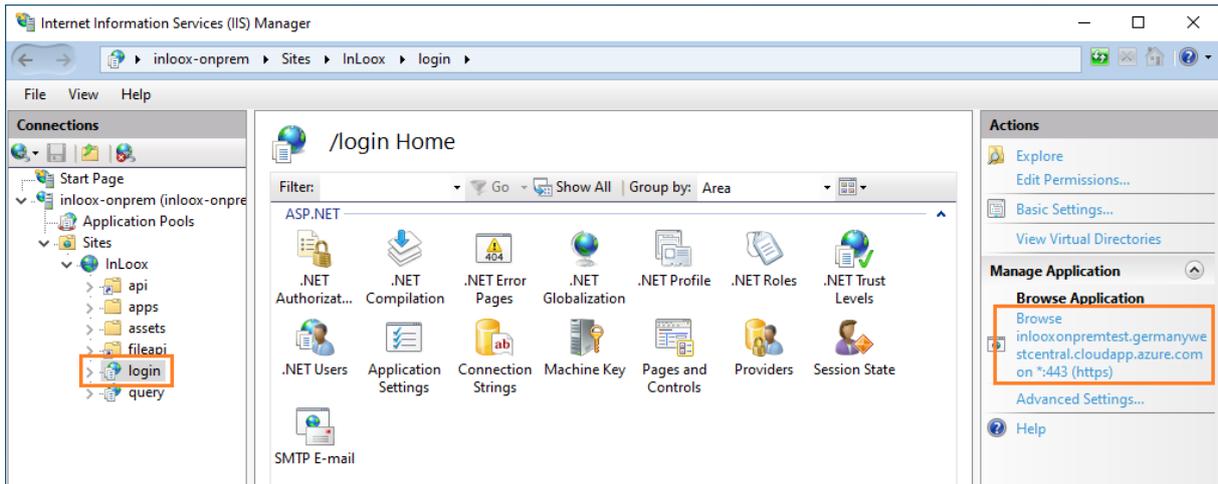
Click **Next**.

14. Save the **connection file** „InLooxConnection.json“. It connects every client with the database.

15. Click **Next** to complete the setup.

16. With the predefined URL (see step 4) InLoox WebApp is now available.

Alternative: Go to **Internet Information Services (IIS)-Manager**. In the left tree view navigate to **InLoox -> login** and on the right sidepanel click **search [address]**.



17. A browser with **InLoox Installations-Setup** opens. Create your admin account. Click on **Create Account**.



InLoox Installation Setup

Create an Admin user to finish your InLoox Setup

 Create account with Microsoft

Create account with Single-Sign-On

or

Name

John Johnson

Email

johnson@younameit.com

Password

.....

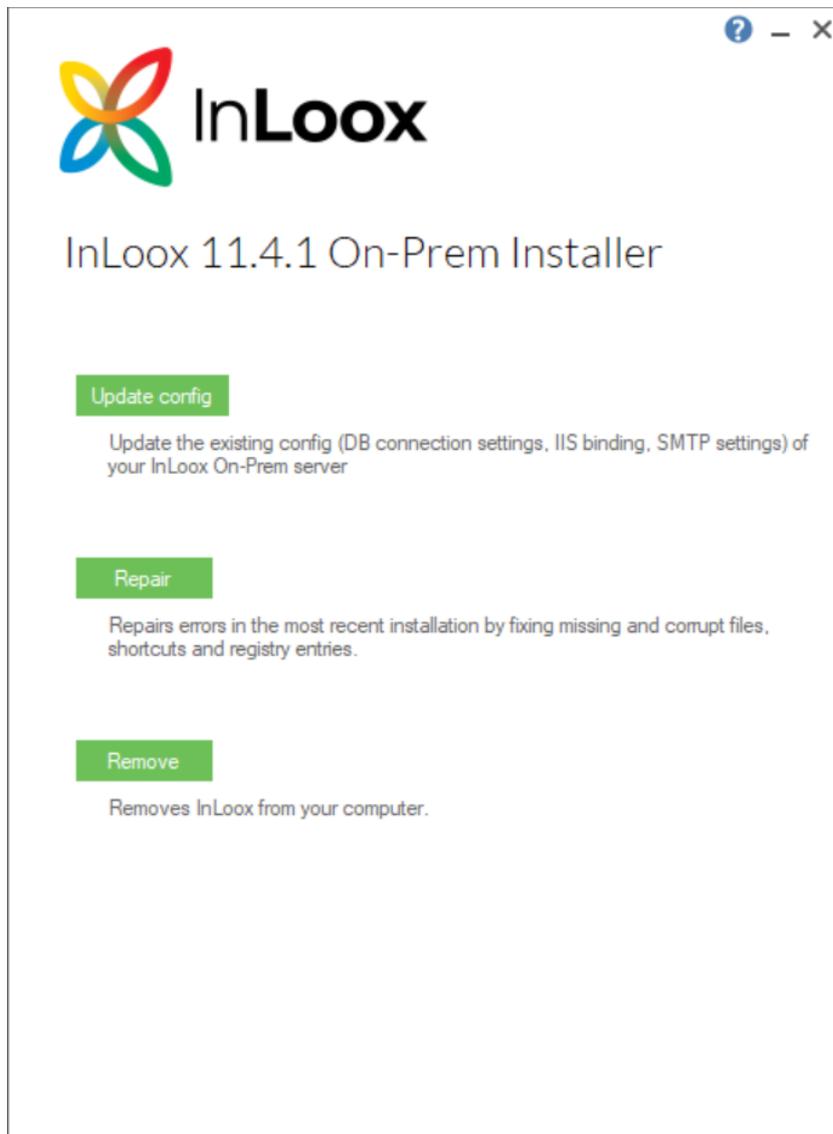
Use 8 or more characters with a mix of letters, numbers & symbols.

Create Account

18. You will be logged in automatically. This process can take up several minutes. Now you can install InLoox on your clients and connect them with your newly created database.

Configuration-Mode

After a completed setup you still can change your configuration. Start the installation process again with admin permissions from the file **InLoox_OnPrem_Server_11xx.exe**. Alternatively you can start the routine from your systems control panel.



Click **Update Config**.

Change the necessary information within the routine and finish the setup again. The installer has all the information prefilled (except for the certificate). You will only need to change your necessary information.

Important note:

All services will be restarted after finishing the setup. The app will not be available for some time.

Errors

An error log will be available at **%temp%** if the setup fails at any point.