



# InLoox 11 for Outlook InLoox 11 for Windows

Migration Setup Guide for InLoox 10 to InLoox 11

Published: Oktober 2022

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 2013 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:

<http://www.inloox.de/support/dokumentation/whitepapers/>

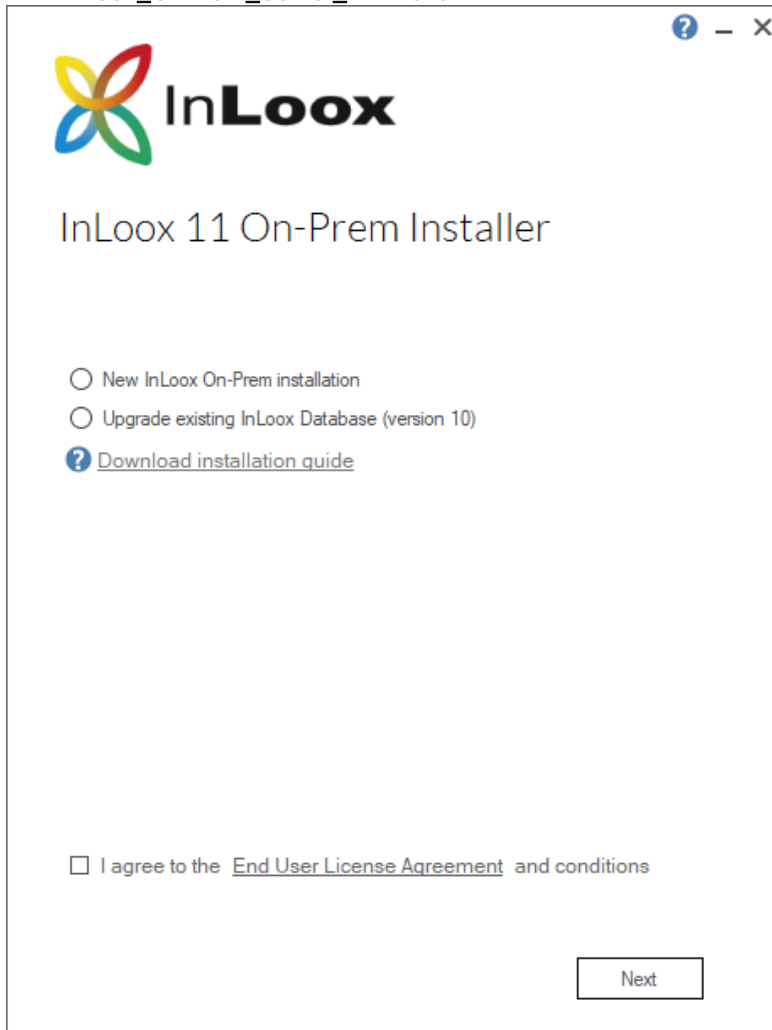
### Upgrade von InLoox 10.x

**Please create a backup of the current database.**

The database can be upgraded with the Server Installation Package.

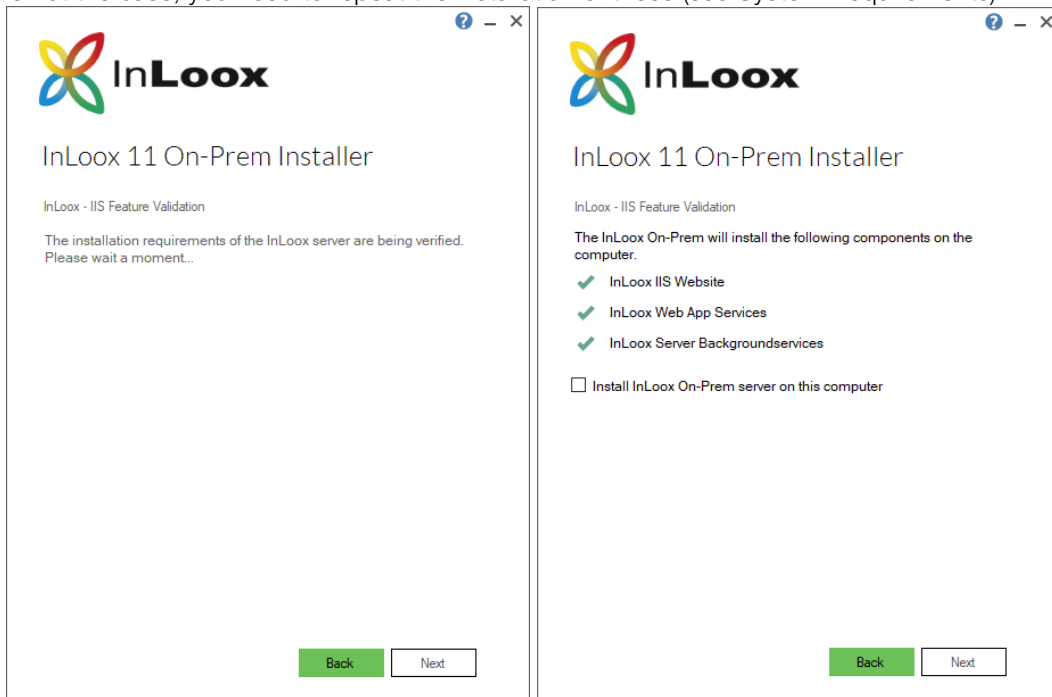
**Important note:** Please install the database server first. For the requirements go to **System Requirements in this document**. InLoox supports Microsoft SQL server which brings a product for free, that can be installed within a few minutes. (MSSQL Express Edition).

1. Run InLoox\_OnPrem\_Server\_11xx.exe



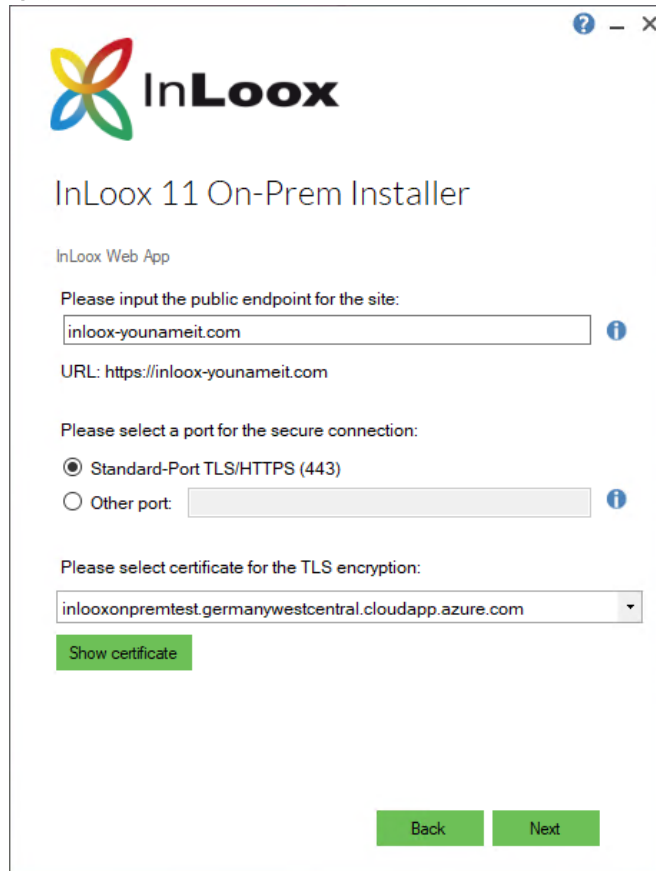
Select **Upgrade existing InLoox Database (version 10)** and check **I agree to the End User License Agreement and conditions**, then click on **Next**.

2. 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).



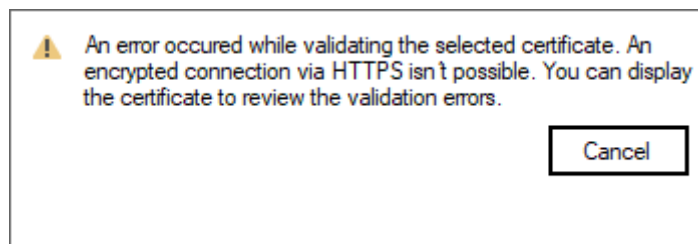
3. Check **Install InLoox On-Prem server on this computer** and click **Next**

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. If this is an invalid certificate you will get the corresponding error message and the setup cannot be finished (see image 1). Click on **Next**.



The screenshot shows the 'InLoox 11 On-Prem Installer' window. It features the InLoox logo at the top left. Below the title, it says 'InLoox Web App'. The first section is 'Please input the public endpoint for the site:', with a text box containing 'inloox-younameit.com' and a URL below it: 'URL: https://inloox-younameit.com'. The second section is 'Please select a port for the secure connection:', with radio buttons for 'Standard-Port TLS/HTTPS (443)' (selected) and 'Other port:'. The third section is 'Please select certificate for the TLS encryption:', with a dropdown menu showing 'inlooxonpretest.germanywestcentral.cloudapp.azure.com' and a 'Show certificate' button. At the bottom, there are 'Back' and 'Next' buttons.

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.

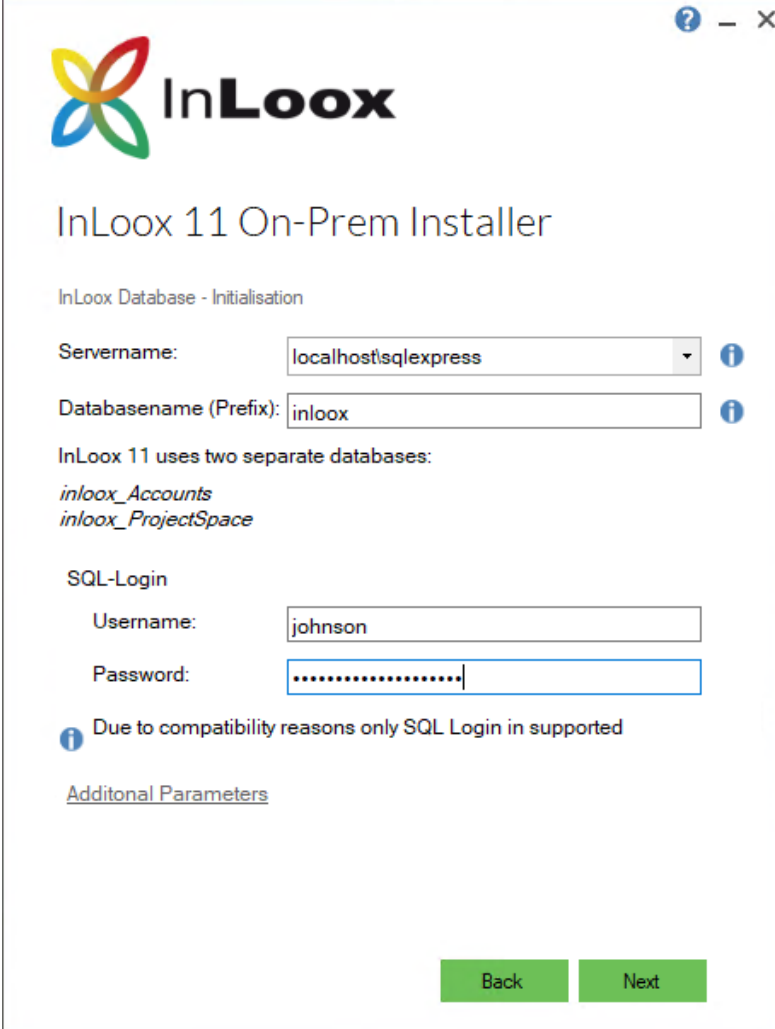
**Example:**

Database name (prefix):Datenbankname (Präfix): inloox\_younameit

→ inloox\_younameit\_Accounts

→ inloox\_younameit\_ProjectSpace

6. Enter the **SQL Login**.

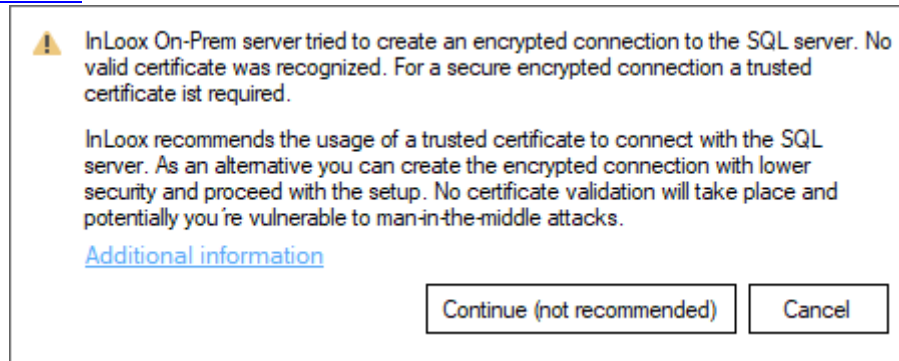


The screenshot shows the 'InLoox 11 On-Prem Installer' window. The title bar includes the InLoox logo and window controls. The main content area is titled 'InLoox Database - Initialisation'. It features a 'Servername:' dropdown menu with 'localhostsqlexpress' selected, and a 'Databasename (Prefix):' text input field containing 'inloox'. Below these fields, it states 'InLoox 11 uses two separate databases:' followed by 'inloox\_Accounts' and 'inloox\_ProjectSpace'. The 'SQL-Login' section has a 'Username:' text input field with 'johnson' and a 'Password:' text input field with masked characters. A blue information icon is next to the text 'Due to compatibility reasons only SQL Login is supported'. At the bottom, there is a link for 'Additional Parameters' and two green buttons labeled 'Back' and 'Next'.

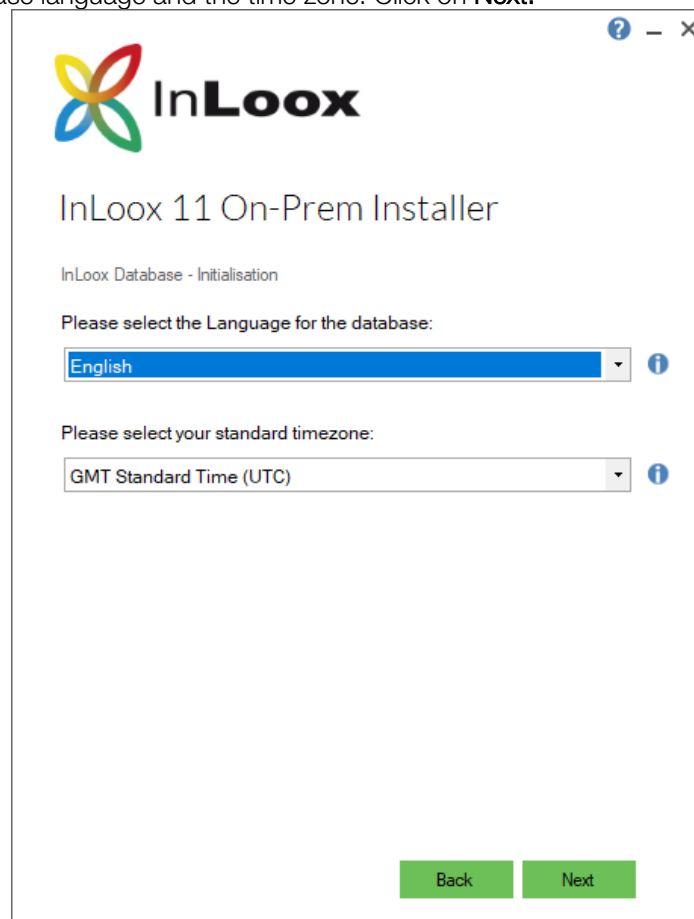
**Important note:** InLoox 11 only allows SQL authentication and no windows authentication. That is because InLoox uses a couple of services which had to be allowed for each user withing windows authentication. Therefore, the SQL User is used as centralized endpoint for these services. During the installation 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.

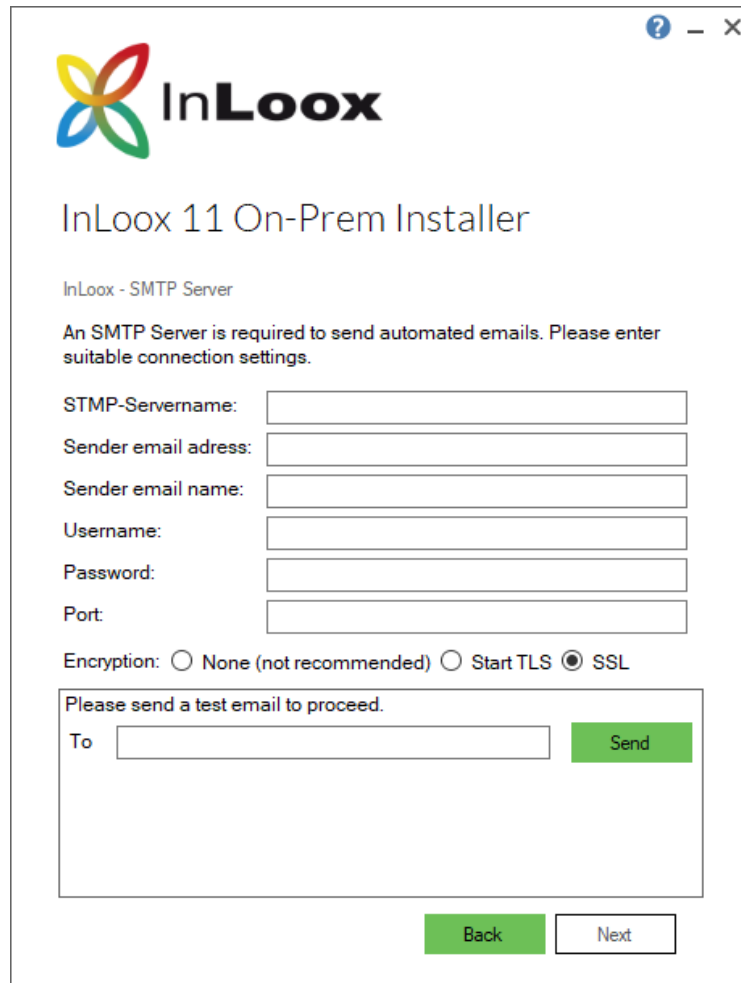
**Important note:** If the used certificate is not suitable for an encrypted connection to the SQL server you will see a warning message. Microsoft recommends SQL connections with encryption (e.g. HTTPS). Because of compatibility InLoox allows the connection without validating the certificate. InLoox 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**.



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



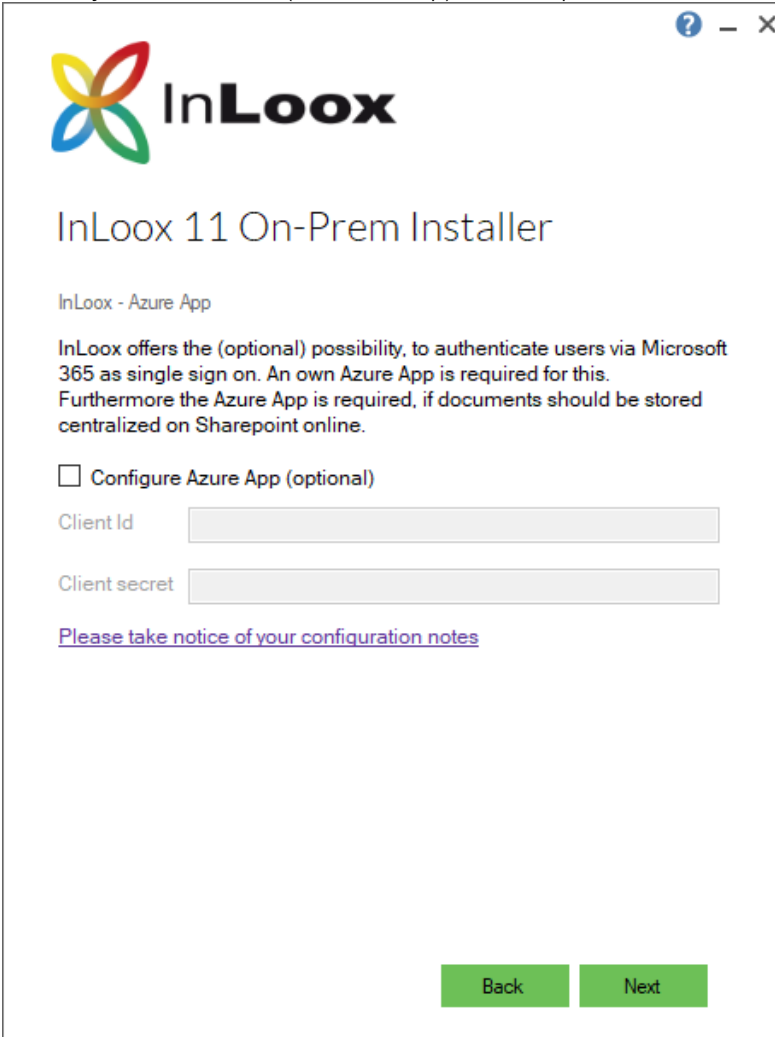
The screenshot shows a window titled "InLoox 11 On-Prem Installer" with the InLoox logo. Below the title, it says "InLoox - SMTP Server". A message states: "An SMTP Server is required to send automated emails. Please enter suitable connection settings." The form includes the following fields and options:

- SMTP-Servername:
- Sender email address:
- Sender email name:
- Username:
- Password:
- Port:
- Encryption:  None (not recommended)  Start TLS  SSL

Below these fields is a section titled "Please send a test email to proceed." containing a "To" field with an input box and a green "Send" button. At the bottom of the window are "Back" and "Next" buttons.

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.



The screenshot shows a window titled "InLoox 11 On-Prem Installer". At the top left is the InLoox logo, which consists of a stylized flower with four petals in yellow, red, green, and blue. To the right of the logo is the text "InLoox". Below the logo and text is the title "InLoox 11 On-Prem Installer". Underneath the title is the subtitle "InLoox - Azure App". The main text reads: "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." Below this text is a checkbox labeled "Configure Azure App (optional)". Under the checkbox are two input fields: "Client Id" and "Client secret". Below the input fields is a link that says "Please take notice of your configuration notes". At the bottom right of the window are two green buttons: "Back" and "Next".

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.

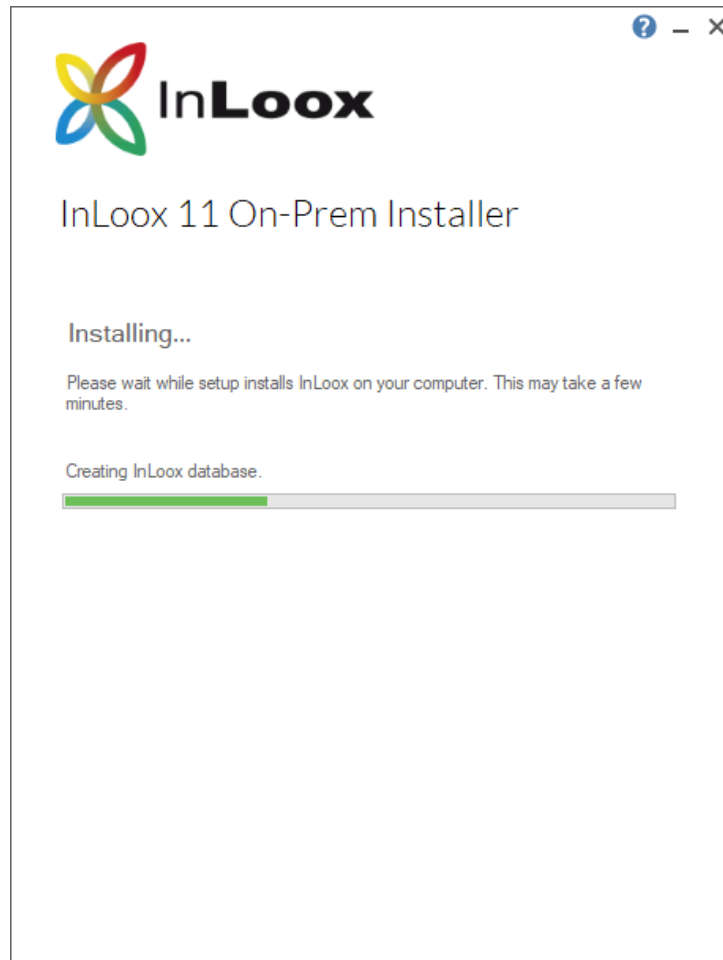
The image displays two side-by-side screenshots of the InLoox 11 On-Prem Installer's file storage configuration screen. Both windows feature the InLoox logo at the top left and the title 'InLoox 11 On-Prem Installer' at the top center. Below the title, the text 'InLoox - File storage' is displayed. A message states: 'For the storage of your project files InLoox requires a server directory. Please enter a sufficient network folder with connection information.'

The left screenshot shows the 'Storage on fileserver' option selected with a radio button. Below this, the 'Serverpath in UNC-format ("\\servername\share")' is entered as 'C:\Projects'. The 'Domain of user' is empty, 'Username' is 'Johnson', and 'Password' is masked with dots. A 'Test' button is visible next to the password field. At the bottom, there are 'Back' and 'Next' buttons.

The right screenshot shows the 'Storage on Sharepoint online' option selected with a radio button. Below this, the 'Sharepoint online URL' is entered as 'younameit.sharepointonline.com'. At the bottom, there are 'Back' and 'Next' buttons.

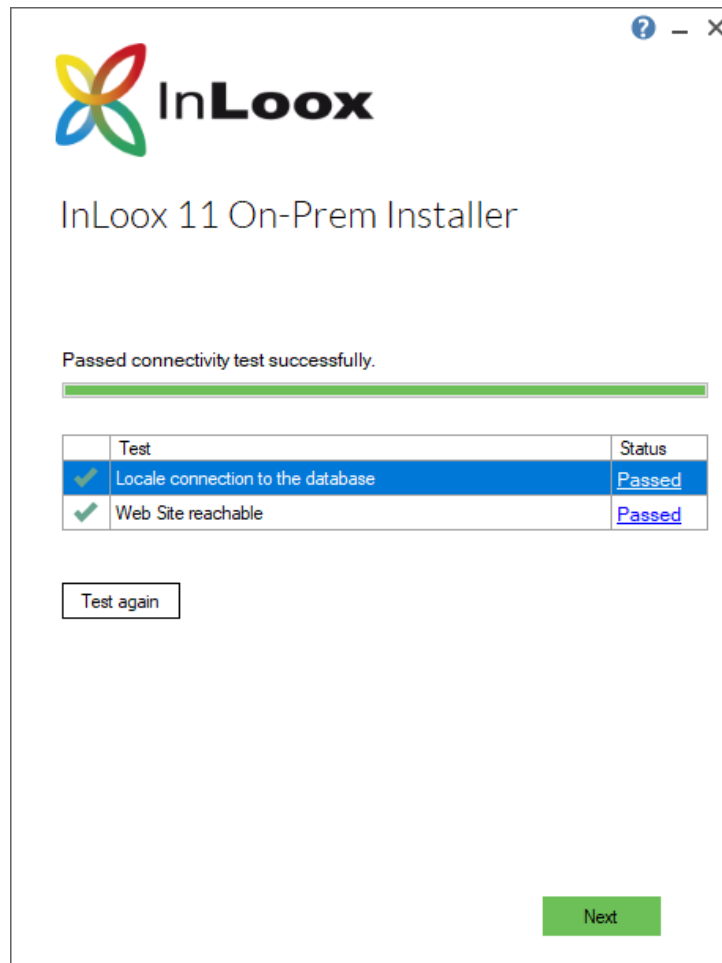
Click on **Test**. If the server path is valid, click **Next**.

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.



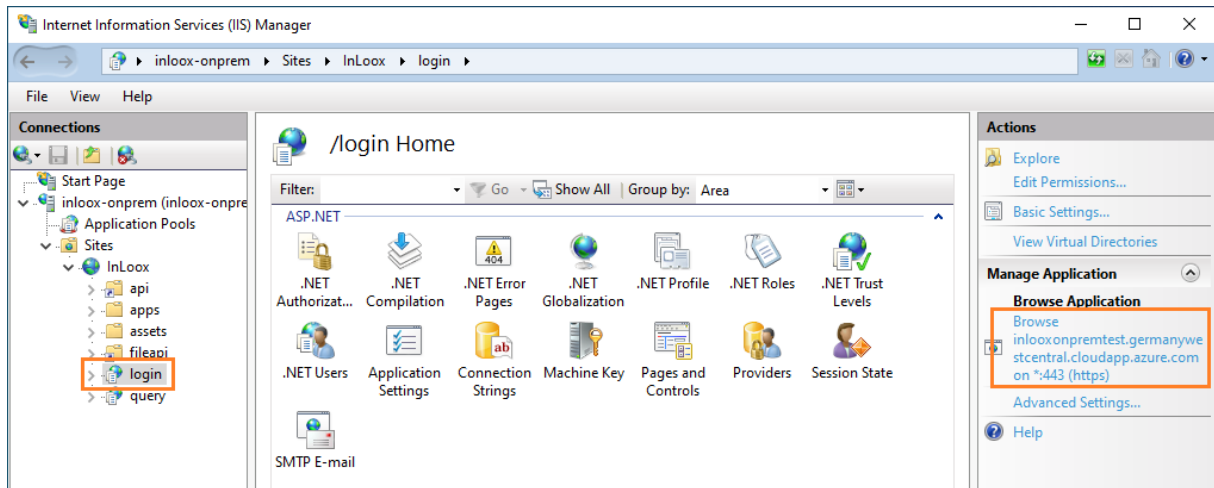
Click **Next**.

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**

.....

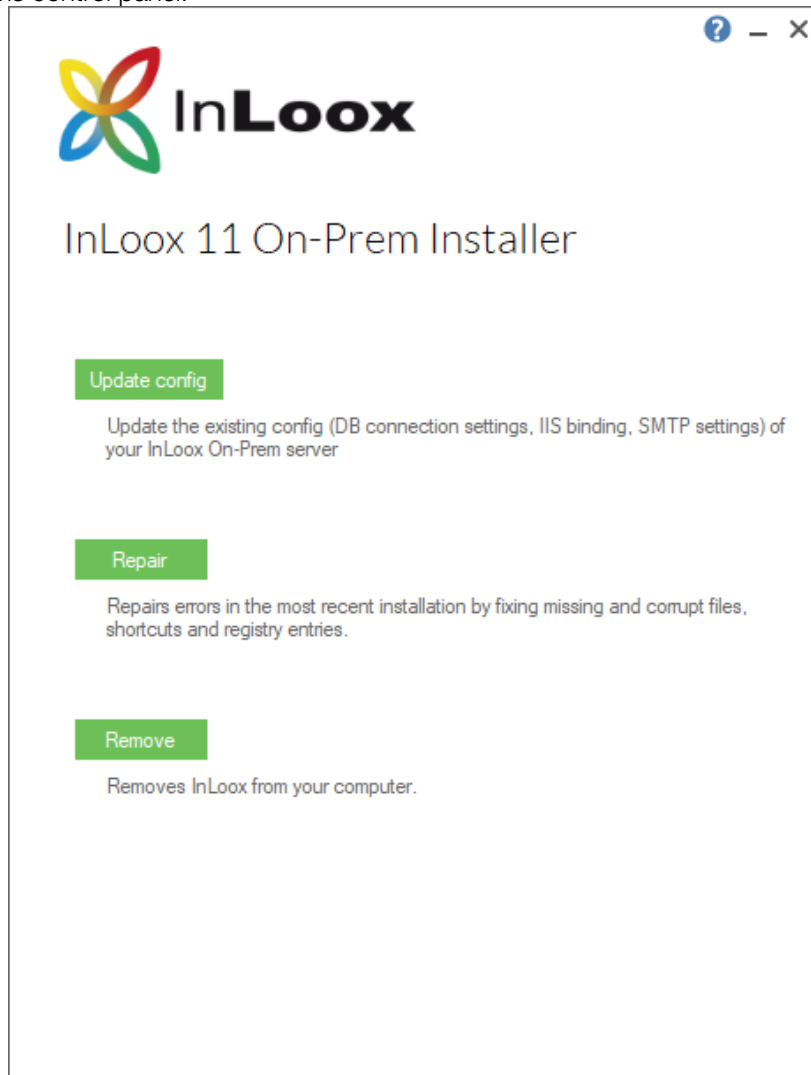
Use 8 or more characters with a mix of letters, numbers & symbols.

[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 Configuration**.

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.