

InLoox First Steps

Inhalt

Create an InLoox Account.....	2
Invite your Team to InLoox.....	2
Assign User Licenses	3
Set Permissions (Users, Divisions, Roles).....	3
Set InLoox Login.....	4
Accept an Invitation to an InLoox Account.....	4
Install InLoox for Windows and InLoox for Outlook.....	5
Install InLoox On-Prem.....	5

Go to our website for latest information: www.inloox.com

The information contained in this document represents the topics covered from the perspective of InLoox at the time of publication. As InLoox must respond to changing market requirements, this does not represent a commitment on the part of InLoox, and InLoox cannot guarantee the accuracy of the information presented herein after the date of publication.

This whitepaper is for informational purposes only. InLoox DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, WITH RESPECT TO THIS DOCUMENT.

Users shall comply with all applicable copyright laws. Regardless of the applicability of the respective copyright laws, no part of this document may be reproduced for any purpose or stored in or read into any data receiving system, regardless of the manner or means (electronic, mechanical, photocopying, recording, etc.) by which it is done, without the express written permission of InLoox GmbH or InLoox, Inc.

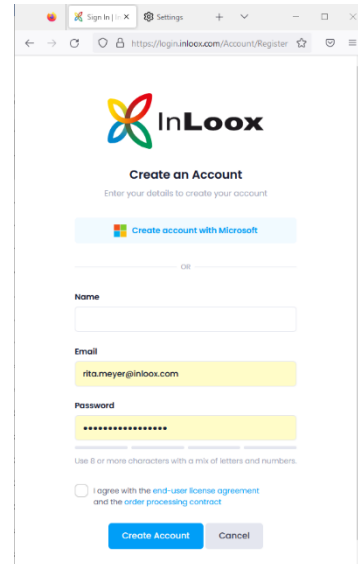
©InLoox GmbH and ©InLoox, Inc. All rights reserved.

IQ medialab and InLoox are either registered trademarks or trademarks of InLoox GmbH in Germany and/or other countries.
The names of existing companies and products mentioned in this document may be trademarks of their respective owners.

Create an InLoox Account

PLEASE NOTE: If you have already created an InLoox trial account, you can skip steps 1-5 and proceed directly to 6.

1. Enter login.inloox.com in your browser. Please make sure that you are using a current browser version.
2. Enter your **first name** and **last name** and choose a **password** that consists of at least 8 characters including letters, numbers and special characters.
3. **Accept** the terms and conditions and the privacy policy
4. Click on **Create Account**.
5. You are redirected to **InLoox Web App** at app.inloox.com and can invite your team to your InLoox account.



You will immediately receive a confirmation email with your login data. Never share this email with third parties!

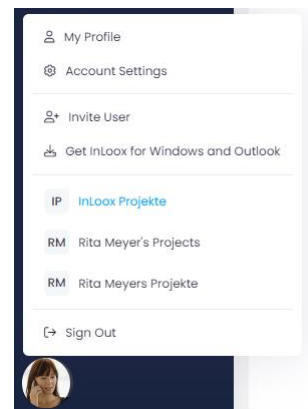
6. Click on the **activation link** in the confirmation email to access all the features of your InLoox account.
7. To check if the activation was successful, click on your **profile picture** at the bottom left, then click on **My Profile**. Under **Overview** > **Profile Details**, it says **VERIFIED** next to your email address.

PLEASE NOTE: The person that creates the InLoox account automatically holds all administrative permissions. You can change these permissions in InLoox Web App in the settings.

Invite your Team to InLoox

PLEASE NOTE: You either need administrator permissions to invite other people to your InLoox account. Or your InLoox administrator has activated the permission **Allow users to invite people to this account** in the InLoox settings for all users of your account.

1. In InLoox Web App, click on your **profile picture** in the bottom left corner.
2. Click on **Invite User**.



3. In the **Invite User dialog window**, enter the name and email address of the person you want to collaborate with in InLoox and also select the basic permissions for this person:
 - a. **Inherited by role:** the person gets permissions based on the project role they hold. This person cannot change any settings for the InLoox account. This is the default selection recommended by InLoox.
 - b. **Read all projects:** The person gets all permissions for all projects and project data but cannot change any settings for the InLoox account.
 - c. **Full permissions:** This person gets administrator permissions. This means that this person can read and edit all projects and project data, as well as change all settings in the InLoox account. Only an administrator can give this permission to another person.

TIP: Always appoint two people as InLoox administrators, so that at least one person in the company is always available in case settings need to be changed or new people need to be provided with user licenses.

4. Click on **Invite**. The invited person will receive an email with a link to your InLoox account.

Assign User Licenses

After you have invited a person to your InLoox account, you have to assign a user license to them. You do that in the **application settings** under **Licensing**.

PLEASE NOTE: You need to have administrator permissions to assign licenses.

1. In **InLoox Web App**, click on your **profile picture** in the bottom left corner.
2. Click on **Account Settings**.
3. Click on **Licensing** on the left. Under **License Assignment**, you will find all the people you have invited to your InLoox account.
4. Change the license assignment from Unlicensed to **Full/Licensed**.

Set Permissions (Users, Divisions, Roles)

You need to set three different types of permissions: user-based permissions for the people invited to your InLoox account. Role permissions for the different project roles, and division permissions for people who may access projects in divisions other than their own. You do this in the **settings** under **Permissions**.

TIP: If you have never set InLoox permissions before, read the InLoox Permissions help article first for detailed information and examples.

1. In **InLoox Web App**, click on your **profile picture** in the bottom left corner.
2. Click on **Account Settings**.
3. Click on **Permissions** on the left.
4. Click on the **Users** tab.
5. Select the person and assign permissions for the entire InLoox account under the **Global** tab first. These permissions apply to all InLoox areas across all projects.
6. Then, under the **Divisions** tab, set the permissions that the person will receive for projects assigned to another division.

You should also set the permissions for the InLoox users' assigned project roles.

1. Under **Permissions**, click on **Roles** next to the Users tab. Now you can define which permissions a person gets when they take on the role of
 - Project manager
 - Team member
 - Partner
 - Customer or
 - Other in a project.

The role permissions are added to the user permissions. A person with very limited user permissions can thus obtain full editing rights in a project as soon as they assume the role of project manager, for example.

PLEASE NOTE: If you do not see any projects in the project list and you cannot create a project, contact your InLoox administrator (the person who created the InLoox account or has the administrator rights).

TIP: For quality management, you should deactivate the **Delete project comments** and **Delete own project comments** permissions. This way you ensure the integrity of your project diary for audits.

For more information and tips, see the help article InLoox Permissions.

Set InLoox Login

You can choose how to log in to your InLoox account:

- Log in with your email address
- Log in with your Microsoft 365 account

1. In **InLoox Web App**, click on your profile picture in the bottom left corner.
2. Click on **My Profile**.
3. Open the **Settings** tab.
4. Under **Login Method**, you will see the email address for your InLoox account. Below that you can reset your password if necessary. Email address and password are the default login to your InLoox account.

If you prefer to log in with your Microsoft 365 account, click **Connect** under **Linked Accounts**.

IMPORTANT: Make sure you are already logged into your Microsoft 365 account in the browser!

Accept an Invitation to an InLoox Account

When somebody invites you to an InLoox account, you receive an email invitation. Please, check your spam folder, should you not find this email in your inbox.

1. The invitation email contains the email address that was used to invite you to your company's InLoox account. To log in, click on **Login**.
2. You will be redirected to **InLoox Web App** where you enter your email address and create a **password**. The password must consist of at least 8 characters, including letters, numbers and special characters.
3. Click on **Log in**.

You will now see the project list. If you do not see any projects, contact the administrator of your InLoox account. They may have to give you additional permissions.

Install InLoox for Windows and InLoox for Outlook

1. Open **InLoox Web App** in your browser at app.inloox.com.
2. Click on your **profile picture** in the bottom left corner.
3. Click on **Get InLoox for Windows and Outlook**.

PLEASE NOTE: If you do not have access to the InLoox account, you can download the InLoox Apps Installer file from the InLoox website:

www.inloox.com/support/downloads/product-releases/

4. The file InLoox_for_Windows.exe will be downloaded to your device.
5. Run the file by double-clicking on it. The installation wizard will start.
6. Agree to the **Licensing Terms** to start with the installation.
7. Check **Install InLoox for Outlook** if you want to install the Outlook client as well. By default, only the InLoox for Windows App is installed. This is not linked to Outlook and works independently of Outlook.
8. Click **Install**.
9. Depending on the operating system configurations, the User Account Control dialog box appears. Click on **Yes**.
10. InLoox will now be installed. When the setup is complete, click **Start**. Outlook will now start. **PLEASE NOTE:** make sure that Outlook is closed during the installation.
11. The InLoox installation wizard will now open. Click on **InLoox Cloud** and then on **Next**. If you have an InLoox On-Prem subscription, then select InLoox On-Prem and click on Next.
12. InLoox will now open your default web browser on the login screen. Log in with your email address and password, or via Microsoft 365.
13. Click on **Finish** to automatically open the project list in InLoox for Windows. In Outlook, you will see the InLoox tab in the menu.

You can now use every InLoox app with your team.

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/downloads/product-releases/ please download the InLoox On-Prem **Server Installer file** and the **Apps Installer file**.



More information, help articles, video tutorials and case studies can be found on our [website](#).

If you have any questions, please contact your InLoox representative directly or contact us via the [InLoox website](#). We are happy to advise you on InLoox training courses, individual customizations and interface development.

If you need technical support, please create a [ticket](#) - we will help you promptly. By logging into the InLoox ticket system, you can track the status of your ticket and make it easier for us to process your request. Thank you!