



## First Steps in InLoox Web App

### InLoox 9 Web App

The following quick guide is designed to give you a short introduction to InLoox Web App so that you can dive right in. It shows you the basic settings, how to create tasks, set up a project and collaborate with your teammates and work colleagues.

An InLoox Whitepaper

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## First Steps with InLoox Web App

InLoox Web App combines your task and project management in one single online platform, available on your desktop, smartphone and tablet.

After creating your account with your email address and self-defined password you can start right away.

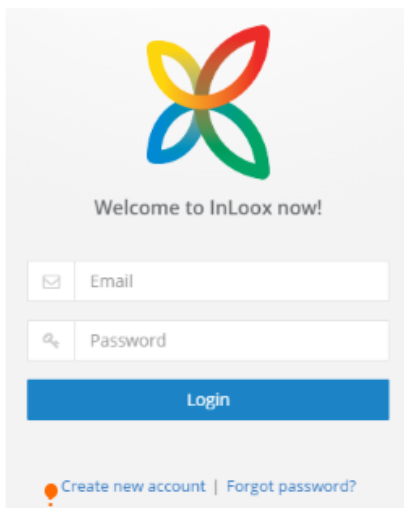
### New Account at [www.inlooxnow.com](http://www.inlooxnow.com)

You don't need an IT department to be able to create an account for InLoox Web App and invite your team mates and work colleagues to this collaboration platform.

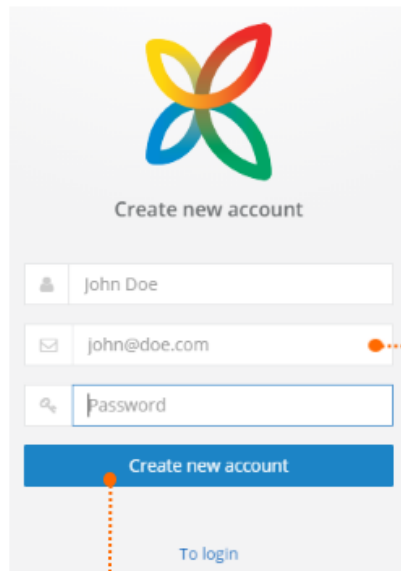
Simply type [www.inlooxnow.com](http://www.inlooxnow.com) in your browser. InLoox Web App supports these browsers and browser versions:

- Internet Explorer 10, 11 and higher
- Mozilla Firefox 16 and higher
- Safari 12.1 and higher (Mac, iPhone, iPad)
- Google Chrome 38 and higher

**TIP** We highly recommend updating your browser regularly to the latest version. This ensures best performance and that InLoox Web App is displayed properly.



Click here to be delegated to the form where you can create your own new account.



As soon as you've clicked on "Create new account" you receive a confirmation email with your login data. **DO NOT FORWARD THIS EMAIL OR YOUR LOGIN DATA TO A THIRD PARTY!**

Please enter your full name and your own email address, then define your own password.  
**ONLY USE AN INDIVIDUAL-RELATED EMAIL ADDRESS WHICH CAN NOT BE ACCESSED BY ANYONE ELSE!**

At the login-site, click on [Create new account](#) and then enter your full name, your own, individual-related email address and define your own password. Then click [Create new account](#). You'll immediately receive a confirmation email with your login data. **Do not forward this email to a third party and do not share your InLoox Web App login data with anybody.**

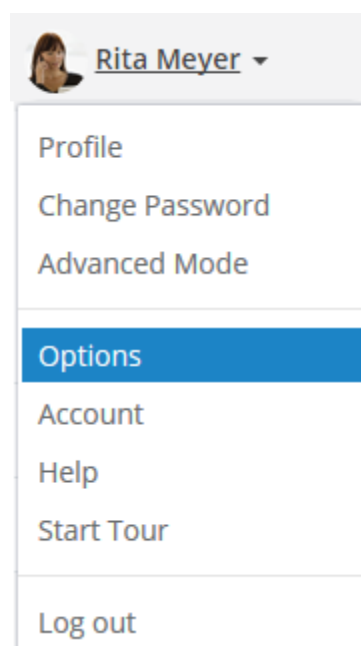
**PLEASE NOTE** As the creator of your or your company's InLoox Web App account you hold the administrator rights. This means that you alone have access to *Options*, which you access by clicking on your name in the [Top Bar](#) and selecting *Options*. This is where, in *Options-Permissions-User Based*, you may change the user-based rights and e.g. transfer the administrator rights to another InLoox Web App user.

## Login for InLoox PM Enterprise Users

In case you are using InLoox Web App in combination with InLoox PM for Outlook, please use your InLoox PM for Outlook login name and password to access InLoox Web App. You do not need to create a new account. All your data is synchronized and transferred from InLoox PM for Outlook to InLoox Web App.

## Settings

To access the setting, click on your name in the [Top Bar](#). Here you can go to your *Profile*, to upload a profile picture, *Change your Password*, change into *Advanced Mod*, access *Options* (if you have administrator richtg), your *Account*, and the *Help*-documentation, start the demo *Tour*, or *Log out*.



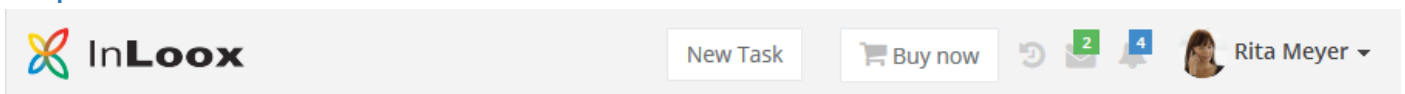
## Simple vs. Advance Mode

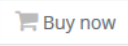
When you first login to your InLoox Web App account, the default setting is the *Simple Mode*. To switch into the Advanced Mode, please click on your name in the [Top Bar](#) and then select *Advanced Mode*. Several InLoox Web App features are only accessible in the *Advanced Mode*. Please, reference the table below.




	Ribbon	Simple Mode	Advanced Mode
General Task Management	Workplace	✓	✓
	Budgeting of tasks	✗	✓
	Add documents to tasks	✗	✓
	Custom fields	✗	✓
	Documents	✓	✓
	Folder view	✗	✓
	People	✓	✓
	Add new contacts	✓	✓
	Invite people	✓	✓
	Create and manage address books	✗	✓
	Table view	✗	✓
	Projects	✓	✓
	Table view	✗	✓
	Filter options, choose columns, save and manage views	✗	✓
	Time	✓	✓
	Table view	✗	✓
	Filter options, choose columns, save and manage views	✗	✓
	Insights	✗	✓

Project Management	Manage	✓	✓
	Categories	✗	✓
	Departments	✗	✓
	Tasks	✓	✓
	Documents	✓	✓
	Folder view	✗	✓
	Lists	✓	✓
	Link lists to	✗	✓
	Zuweisen	✗	✓
	Time	✓	✓
	Planning	✓	✓
	Budgets	✗	✓

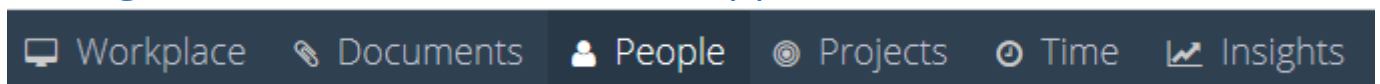
## Top Bar






Use the Top Bar to quickly create a [New Task](#) and navigate to the *Workplace* by clicking on the InLoox Logo from every page of InLoox Web App. Click on  if you wish to upgrade your InLoox Web App edition and access the [settings](#) by clicking on your name.

If you click on  (*recent projects*) you can access your recently created projects. You see how many notifications  from the [Chat](#) and the [project notes](#) you have received and how many new tasks have been assigned to you. Alerts  notify you about upcoming tasks. Click on these icons, and you can directly go to the respective chat discussion, the project notes and newly assigned tasks as well as your upcoming tasks.

## Inviting Others to Your InLoox Web App Account




If you have purchased several user licenses you can invite others to your InLoox Web App account. First, switch into *Advanced Mode* by clicking on your name in the Top Bar and selecting *Advanced Mode* from the settings menu. Then navigate to *People*. On the right you see several icons 

Click on , enter the email address of the person you want to invite, select English or German as the email's language and click on .

**PLEASE NOTE** User licenses are automatically assigned to new InLoox Web App users. If you are the administrator, you can change this to manually assign the account licenses if you go to Options-Licensing-User Licenses and remove the check from  Automatic user license assignment. Then you have to manually assign licenses to invited users.



Here you can also check how many user licenses you have, how many are unassigned and if want to reassign user licenses, you can delete existing ones and reassign them to new users.



**TIP** To make sure, that new users can start working with InLoox Web App right away, you need to assign them certain permissions. To do that, go to Options-Permissions-User Based, click on  next to a user and select those permissions, this user is supposed to have.

## Create a New Task

After logging in, you are at the *Workplace*. Here you get a concise overview of all your tasks. The *Workplace* also has a calendar and a stream, which keeps you informed on any news or updates in your tasks and projects.

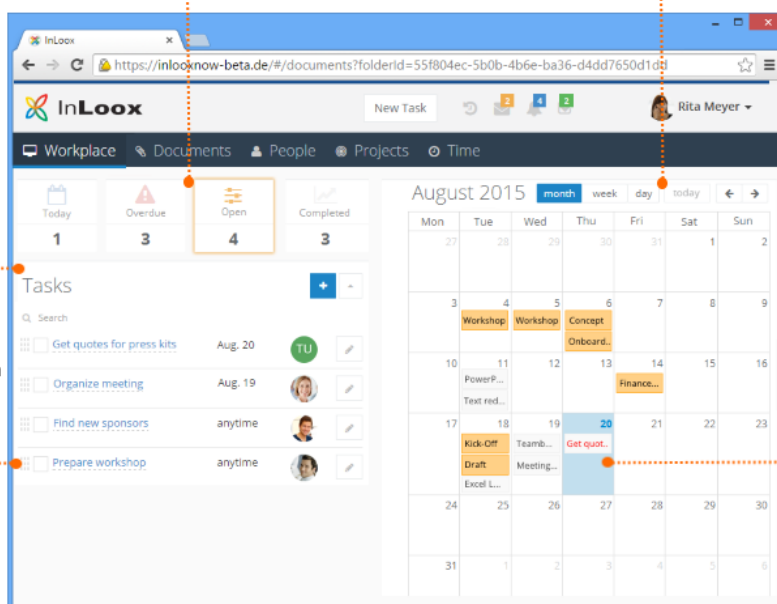
The workplace provides an overview of all your tasks grouped as today's tasks, overdue, open and completed tasks. Click e.g. on "Open" and all open tasks are displayed in the tasklist below.

The calendar navigation allows you to switch between month, week, and day view or shows you only today. Click   to navigate e.g. to the previous or following month.

Click on  to create a new task, which immediately appears in the tasklist below. You can edit your tasks by clicking on  which opens a dialogue window where you can also delete your tasks or assign the task to someone else.

You can drag'n'drop any task from the tasklist to the calendar, which automatically assigns a date to this task.

If you want to check a task off the list, simply click into the box  next to the task. This task is then moved into the Completed Tasks list.





The screenshot shows the InLoox Workplace interface. At the top, there's a navigation bar with 'Workplace', 'Documents', 'People', 'Projects', and 'Time'. Below this, there are four task filters: 'Today' (1), 'Overdue' (3), 'Open' (4), and 'Completed' (3). The 'Open' filter is selected. The main area is divided into two sections: 'Tasks' on the left and a calendar on the right. The 'Tasks' section lists several tasks with checkboxes, search, and edit icons. The calendar on the right shows the month of August 2015 with various tasks assigned to specific days. A user profile 'Rita Meyer' is visible in the top right corner.

Click on a day in the calendar to create a new task. A dialogue window opens where you can edit e.g. the date, effort, and assignee.

There are three ways to create a new task:

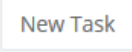
### 1. The quickest way

Click on  , give your new task a name and press ENTER. The new task does not yet have a start or due date or effort. If you want to change that, drag the task into the calendar to give it a due date or click on  to open the *Edit Task* window where you can edit all the details.


### 2. The visual way

If you already know the due date of a task, you can e.g. click on Tuesday, 10 a.m. and edit the task.

### 3. The universal way

Click on the button  in the [Top Bar](#) to open the *Edit Task* window. This button enables you to create new tasks from everywhere in InLoox Web App.

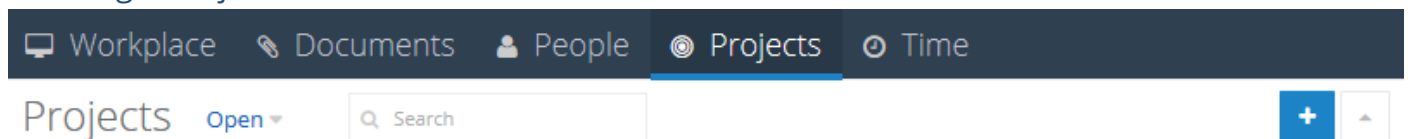
**PLEASE NOTE** Tasks that you create either in the [Top Bar](#) or Workplace are your personal tasks without an assigned project. Nobody else can see or edit these tasks. Learn [here](#) how to assign tasks to a project, and read [here](#) how to create project tasks.


If you want to mark a task as done, set a check in the box  of the completed task. It is now displayed under the completed tasks.

## Combine Tasks as a Project

Simple task management can be done in the *Workplace*. If you have several tasks that are dependent on each other or have to be performed within a certain order it is advisable to combine them within a project

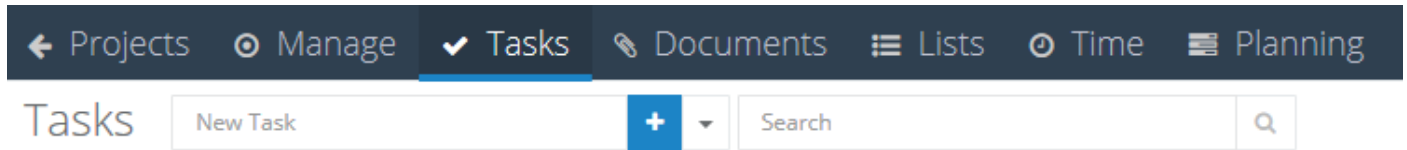
### Creating a Project




First, navigate to *Projects* and there click on  . You are directed to the *Manage* site, where you can edit the project's details. You are automatically assigned as the project manager.

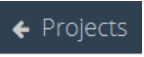
Now, there are two possibilities to fill this project with tasks.


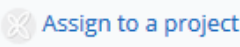
## Create Project Tasks



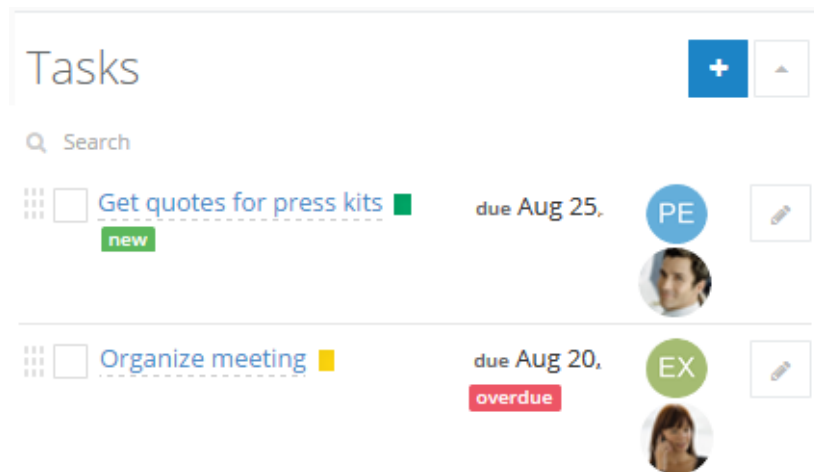
While you are still in the project, click on *Tasks* in the ribbon and then into the *New Task* text box to give it a name. Click  and the new task is created, displayed in the left column. Click on the task and drag it into another column, if you'd like to change the task's status e.g. into *In Progress*.

## Assign a Task to an Existing Project




In order to assign existing tasks to an existing project, navigate back to the *Workplace* by either clicking on  and then on *Workplace*, or by clicking the InLoox logo in the Top Bar.


Now click on  to open the *Edit Task* window and click on the tab *Details*. There you click on  and select the project you want to assign the task to. When you click on *OK*, the project's picture, which is clickable and will get you directly to the project's *Manage* site, is shown next to the task.

**EXAMPLE** Here you see two tasks assigned to two different projects. Below the projects' pictures you see either your own profile picture, if it is a task created by you, or the profile picture of the person that assigned the task to you.



## Create New Contacts

 Workplace
  Documents
  **People**
 Projects
  Time
  Insights

In order to create new contact profiles, click on *People* and there on . The *New Contact* window opens, where you can add all necessary details like phone number, mail address or website. Additionally, you can see the person's *Workload*, which shows you the person's capacities to e.g. take on additional workload, if this person has already been assigned tasks.

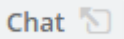
Contacts that are created by you do not have access to your InLoox Web App account. They can be e.g. customers, or service providers. If you want them to be able to collaborate with you on your InLoox Web App account, you need to have purchased several user licenses and invite people to your account. [Here](#) you learn how this is done.

If you click on  you can sort your contacts e.g. by name or company or country.




## Collaborating

InLoox Web App makes communicating and working together with your team mates very easy. You can open the [Chat](#) to send messages or pictures to your InLoox Web App colleagues or use [project notes](#) to exchange information on specific projects. Upload and share documents either for your own [document management](#) or within projects [for everybody](#) to read and/or work with.

### Chat with Your InLoox Web App Colleagues

In the bottom right-hand corner, click on  to open the chat window. You access the chat from every site. It enables you to quickly communicate with other InLoox Web App users on your account and exchange messages and pictures.

To send a chat message, open the chat and click on . Select the person you want to chat with and type in your message. Click **BUTTON** or press CTRL + ENTER (CMD + ENTER).


To upload an image, click . You can send images in the usual browser compatible formats .jpg, .png or .gif. As soon as you press *Open*, the picture is sent and ready for download by your chat partner. By clicking  you download images from the chat. If you wish to end a chat conversation with a person, click on .

## Share Project Notes

← Projects **Manage** ✓ Tasks 📎 Documents ☰ Lists ⌚ Time 📅 Planning ⇌ Budgets

In order to post project notes, navigate to *Projects*, select the project you want to post a note in which leads you to the project's *Manage* site. There, on the right hand side, click on the tab *Notes* and type in your note in the text box. Click **Post** and your note is displayed immediately. Now, everyone working on this project, who has at least reading permissions, can read your project note.

If you address the project with @NAME to one our your InLoox Web App colleagues, this person is alerted to this project note and will also receive this alert in the recap email with every other update relevant to this person. This project note is nevertheless also displayed to others.

Click on  to delete your project note.

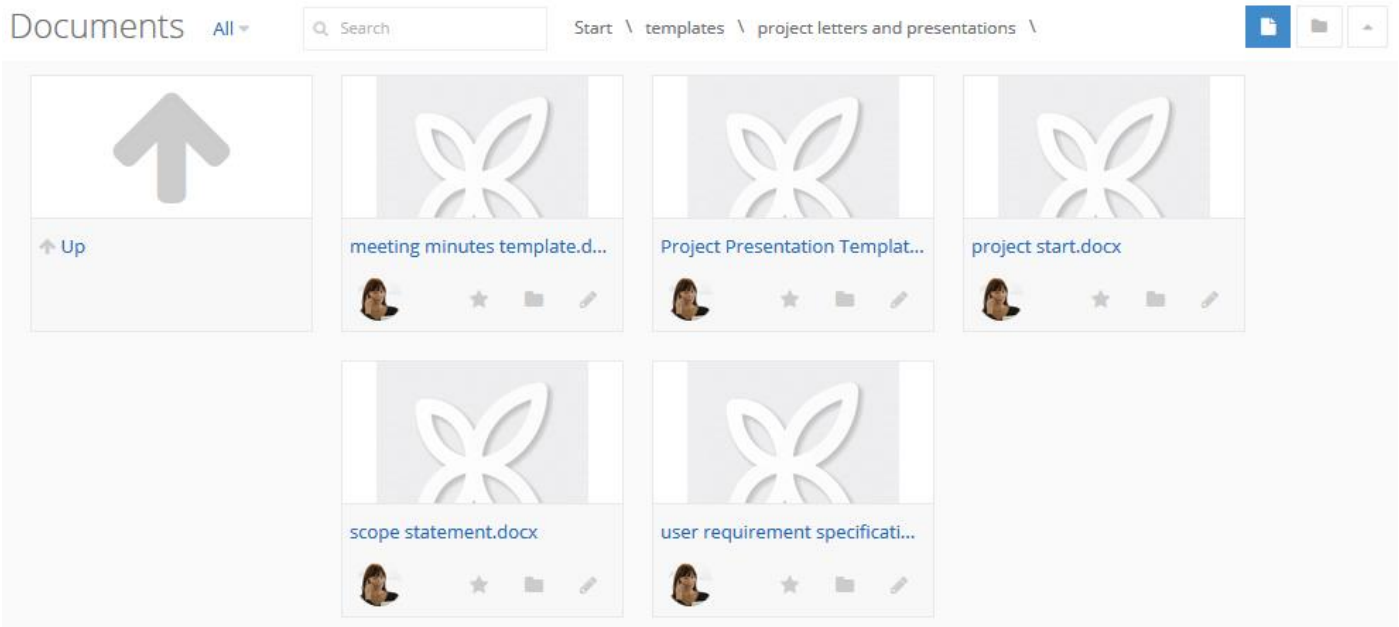
## Personal Document Management

🖥 Workplace **Documents** 👤 People 📍 Projects ⌚ Time 📈 Insights

*Documents* is your personal document management site where you can upload files and create folders.

If you are in the *Simple Mode*, you see the clickable file path next to the search box. In *Simple Mode*, you only see your personal folders and documents.

**EXAMPLE** Here you see all the files from the personal folder *project letters and presentations*:

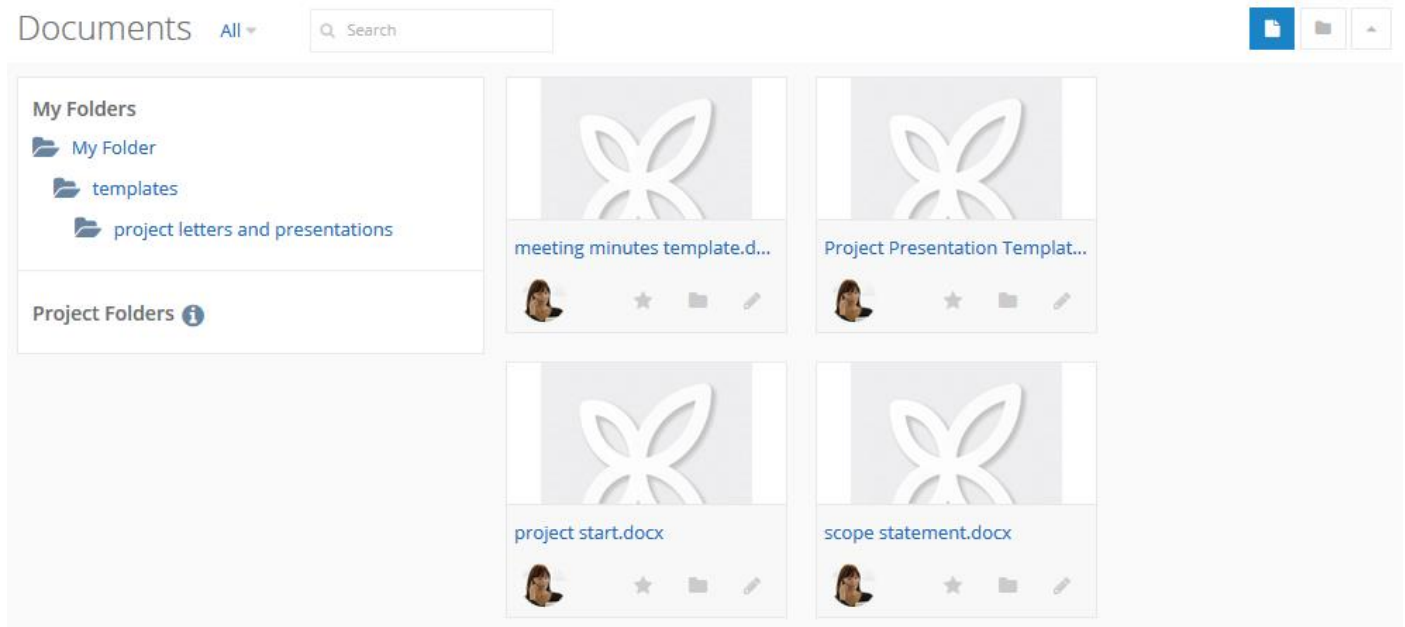


Documents All ▾  Start \ templates \ project letters and presentations \



- ↑ Up
- meeting minutes template.d...
- Project Presentation Templat...
- project start.docx
- scope statement.docx
- user requirement specificati...

If you switch into *Advanced Mode*, you see folder structure on the left hand side, that is divided into your own folders (My Folders) and Project Folders for every project that you have a role in.

**EXAMPLE** Here you see all the personal files in the folder *project letters and presentations* displayed in the Advanced Mode:




### *Create a New Folder*


To create a new folder, click on , enter the folder's name in the drop-down text box and click . You can now upload documents to the new folder.

**PLEASE NOTE** The folders (and their documents) that you have created here, are only accessible by you and cannot be accessed by other InLoox Web App users.

### *Upload Documents*

To upload a new document, click on . Then select a documents and click Open. The uploaded document is now displayed as a file card with a preview image.

### *Move Documents to Other Folders*



If you want to move a document from one folder to another, click on  in the document's card and then select the folder you want to move this document to. Click on *OK*.

## Project Documents

← Projects   ● Manage   ✓ Tasks   📎 Documents   ☰ Lists   ⌚ Time   📅 Planning   ⇌ Budgets

First, select the project for which you want to upload documents, then click on *Documents*.

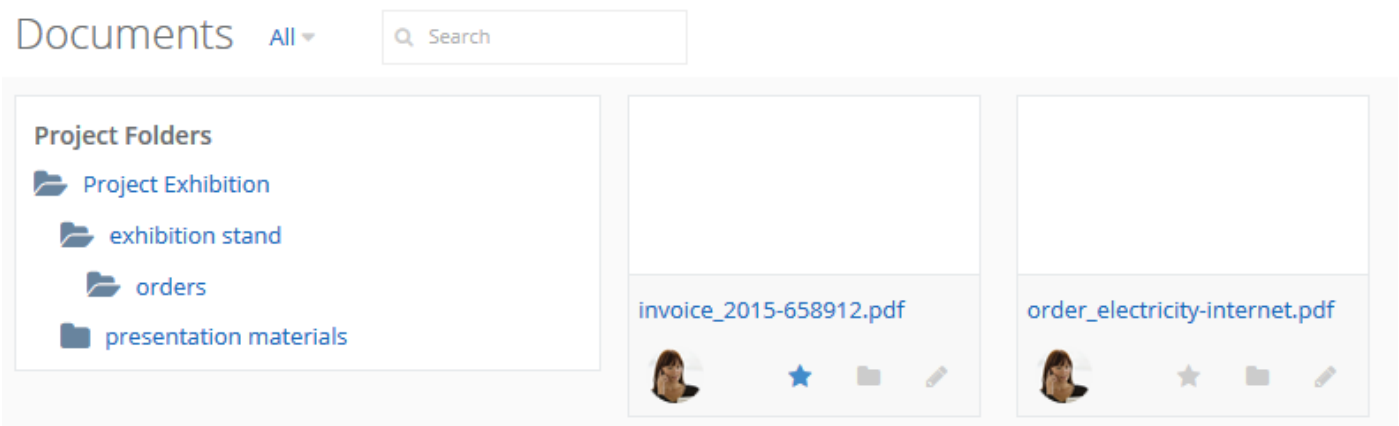
### *Upload Project Documents and Create Folders*

Upload a new document by clicking on  and create a new project folder by clicking on . InLoox Web App automatically creates a project folder with the project's name.

**PLEASE NOTE** Every document you upload within a project is only accessible for those who work on this project and have at least reading permissions for this project and its documents.

If you switch into *Advanced Mode* you see the project folder structure on the left hand side, which shows all the folders of this project.

**EXAMPLE** Here you see the documents from the folder *orders* in the project folder *Project Exhibition*:



The screenshot shows the 'Documents' page in the InLoox web app. At the top, there is a search bar and a dropdown menu set to 'All'. On the left side, under 'Project Folders', a tree view shows the following structure:

- Project Exhibition
  - exhibition stand
  - orders
  - presentation materials

The main area displays two PDF documents from the 'orders' folder:

- invoice\_2015-658912.pdf**: Includes a user profile picture, a blue star icon, a folder icon, and a delete icon.
- order\_electricity-internet.pdf**: Includes a user profile picture, a grey star icon, a folder icon, and a delete icon.