InLoox Documentation

Contents

NEW FEATURES IN A FAMILIAR ENVIRONMENT

The project management package InLoox operates within Outlook, simplifying the combined administration of projects, documents, resources and budgets and providing highly effective support for everyday standard business processes.

InLoox provides a current overview of the status and development of all projects, including incurred costs and budgets. It is thus possible to call up all financial data during the course of the project and to have the latest situation at your fingertips. InLoox ensures a high level of planning and scheduling reliability and furnishes comprehensive project documentation. Your project team, as well as your partners and customers, will appreciate this greatly. InLoox can be learned in the shortest time and is easy to use and simply structured.

Further information about the InLoox product range, updates and new versions can be found on the internet.

To be sure of a smooth start with InLoox, please read first the chapter on Basics.

CONTACT AND SUPPORT

Thank you for choosing the integrated project management system **InLoox**.

InLoox is a product of InLoox GmbH in Munich. As a customer of InLoox you are entitled to the manufacturer's direct service and support. We are also pleased to answer any questions you may have about the product generally during the normal office hours of 9:00 am till 5:00 pm Monday to Friday except public holidays. Please note that we are in the CET time zone (GMT+1).

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Everyday Tasks

EVERYDAY TASKS

Get to know the basic features of InLoox - via a series of brief instructions.

Tip: Basic knowledge of Microsoft Outlook is assumed. If you have any general questions concerning the setup or use of Outlook, please look up the Microsoft Outlook Help or ask your system administrator.

What would you like to do?

- Create a new project
- Open a project
- Find a project
- Record an activity or a document
- Create a Mind Map
- Generate a project plan
- Check resource workload
- Display or process work packages
- Save files and documents
- Create a budget
- Create an invoice
- Monitor a project
- Lock or complete a project
- Create a report
- Define views

Working with Projects

CREATING A NEW PROJECT

A brief summary of how to create a new InLoox project:

1. Click **Projects** in the **InLoox Ribbon Menu** or **InLoox Folder** in the **InLoox Toolbar**
   *Outlook switches to the **InLoox project overview***

2. Double-click on an empty field or use the button **New Project**
   A new project is opened
   As creator of the project you will automatically be registered as project manager

3. Input the required information, e.g. **Project name**, **Customer** ...
   The list of customers contains a preliminary selection of all companies participating in InLoox projects

4. Click **Save and Close**

Continue with Open project

OPENING A PROJECT

A brief summary of how to open an InLoox Project:

1. Click **Project**s in the **InLoox Ribbon Menu** or **InLoox Folder** in the **InLoox Toolbar**
   *Outlook switches to the **InLoox project overview***

2. Double-click on one entry in the list, e.g. **Demo project**
   The selected project is opened

3. Click on a section, e.g. **Document**

4. Input new entries or make any required changes

5. Click on **Save and Close**

Or:

1. Click **Recent Projects** in the **InLoox Ribbon Menu / Toolbar**

2. Select a **project** from the list which displayed

Continue with Finding a project

FINDING A PROJECT

To Outlook 2003/2007 View

Outlook 2010 View

A brief summary of how to search for information in all InLoox projects:

1. Click **Projects** in the **InLoox Ribbon Menu**
   *Outlook switches to the **InLoox project overview***

2. Input a search text into the field **Search**, e.g. **InLoox**

1. Click **Start search**
   InLoox carries out the search. A list of results is displayed. It is displayed where the text was found. Values of custom fields are not searched.

2. Double-click on one entry to open the required project

Or: **Use views**

1. Click **Projects** in the **InLoox Ribbon Menu**
   *Outlook switches to the **InLoox project overview***

2. Select a view from the **Current View** area in the **InLoox Ribbon Menu**, e.g. **Grouped by managers**

3. Double-click on one entry to open the required project

Or: **Use filter**

1. Click **Projects** in the **InLoox Ribbon Menu**
   *Outlook switches to the **InLoox project overview***

2. The **filter row** is above the list of projects:
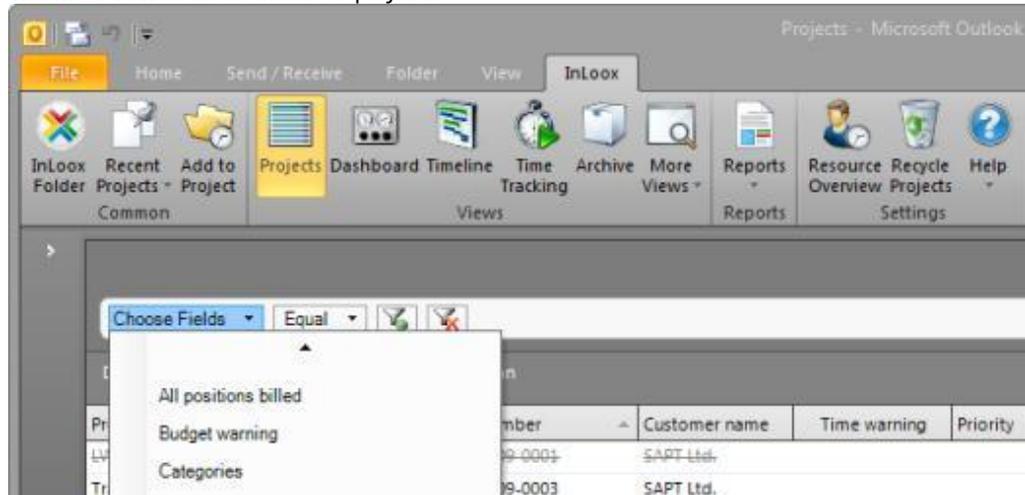
*Filter row with active filter ***Categories***

3. Input text, e.g. **Marketing** and press **ENTER**
    InLoox filters the Projects according to the criterion ("Project name equals Marketing")

4. Double-click on one entry to open the required project

💡 Tipp:

If you do not see the filter row, it was hidden before. You can make it visible again, by right clicking into the project list and selecting **Show Filter** in the context menu.

Continue with Record an activity or a document

To Outlook 2010 View
Outlook 2003/2007 View

A brief summary of how search for information in all InLoox projects:

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
    *Outlook switches to the **InLoox project overview***

2. Input a search text into the field **Search**, e.g. **InLoox**

1. Click on **Start search**
    InLoox carries out the search. A list of results is displayed. It is displayed where the text was found. Values of custom fields are not searched.

2. Double-click on one entry to open the required project

Or: **Use views**

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
   *Outlook switches to the **InLoox project overview***

2. Select a view from the **Current View** area in the **InLoox Toolbar**, e.g. **Grouped by managers**

3. Double-click on one entry to open the required project

Or: **Use filter**

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
   *Outlook switches to the **InLoox project overview***

2. The **filter row** is above the list of projects:
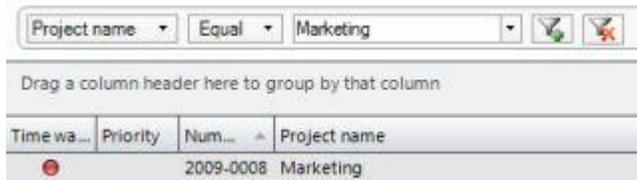
*Filter row with active filter ***Marketing****

3. Input text, e.g. **Marketing** and press **ENTER**
    InLoox filters the Projects according to the criterion ("Project name equals Marketing")

4. Double-click on one entry to open the required project

Tipp:

If you do not see the filter row, it was hidden before. You can make it visible again, by right clicking into the project list and selecting **Show Filter** in the context menu.

Continue with Record an activity or a document

COMPLETING OR BLOCKING A PROJECT

Concise instructions on completing or blocking a project:

1. Open a project

2. In the **Status / date** area:

   - Select **locked** in the **Mode** list
     The project can now only be edited or deleted by authorized users.

   - Select **Completed** or **Aborted** as status

3. Click on **Save and Close**

Continue with Create report

RECORDING A TIME TRACKING ENTRY OR DOCUMENT

A brief summary of how to record a time tracking entry or document in an InLoox project:

Method A: **Adding directly from Outlook**

1. Select an **email**, for example, from your personal Outlook Inbox (or any other Outlook folder)

2. Click on the button **Add element** in the **InLoox Ribbon Menu / Toolbar**
   *The dialog box **Add Element** is displayed.*

3. Select a **Project**

4. Select the action to be taken:

   - **Record new time tracking entry**
     Time tracking entries are records of time spent for a project, e.g. work carried out

   - **Add to document store**
     Documents are files which are assigned to a project

        1. Select the action InLoox is to take on the attachment, if present
           Details of this feature can be found under Attachment management

        2. Select a **sub-folder** if needed

        3. Select **Link document with time tracking item**

           InLoox will then display a paper clip (📎) in the Time Tracking section next to the item.
           The paper clip gives access to all documents linked to a given item.

5. Click in **OK**
   *If you have selected the option **Create new item**, the dialog box **New Item** is displayed*

6. Please input at least the following:

   - **Date and time** (proposed automatically)

   - **Duration** respectively **End**

   - **Group**, to which the time record item belongs
     or alternatively: the **Activity** to which the time record belongs

7. Click on **OK**

Method B: **Open a project and add via the project form**

1. Open a project or create a new one

2. Click on the button **New** in the **Time Tracking** section.
   *The dialog box **New Item** is displayed.*

3. Please input at least the following:

   - **Date and time** (proposed automatically)

   - **Duration** respectively **End**

- **Group**, to which the time record item belongs
  or alternatively: the **Activity** to which the time record belongs

4. Click on **OK**

5. Click on the **Documents** section

6. Create a new entry in the **Documents** section:

   - Click on **New**
     *The dialog box **New Document** is displayed:*

   - Select a **Type**, e.g. **File**

   - Specify the **Path** of the document. Click on the button "**...**" to open a search window

   - Specify whether InLoox is to copy the document **into the project folder**

   - Select if required a **time tracking item**, to which the document is to be linked.
     InLoox will then display a paper clip (📎) in the Time Tracking section next to the item.
     The paper clip gives access to all documents linked to a given item.

   - The following additional information can also be input:

     - **Status**, e.g. **completed** or **awaiting release**

     - **Notes** (multiple-line) for comments and remarks

   - Click on **OK**
     If defined, InLoox will copy the document automatically to the project folder

7. Click on **Save and Close**

Continue with Create a project plan

CREATING A MIND MAP

Concise instructions on creating a Mind Map:

1. Open a project or create a new one

2. Click on the **Mind Map** tab

3. Under **Mind Map**:

   - Click on **New Mind Map**
     *The dialog box **New Mind Map** is displayed*.

   - Enter a **Name**

   - You can fill existing custom fields with data. Click on the tab **Custom** and type in your desired data

4. Optional: Rename a node

   - Chose **Edit Node**

   - Change the description of the node

5. Optional: Create sub nodes

   - Select the **node** where the sub node shall be created

   - Chose **New Node**
     A new node is displayed

   - Optional: Edit the node

     - Set the status of the node

     - Choose a format and a symbol under the tab **Format & Icon**

     - Add resources on the tab **Resources**

     - Attach documents to the node with the help of the tab **Documents**

     - Add values to custom fields on the **Custom** tab

6. Optional: Create a second independent Mind Map: Click on **New Mind Map** on the ribbon or at the bottom of the window

7. Save your Mind Map

CONVERTING A MIND MAP INTO PLANNING

A brief summary of how to convert a mind map into the planning:

1. Open the Mind Map

2. Click on **Copy To Planning**
   *The dialog box **Copy Mind Map** is displayed*

3. Specify **start date and time**

4. Since nodes have no information about duration in the mind map you have to specify default duration.

5. If a resource is assigned to one of your nodes, you can specify a notification type.

6. Click on **OK**

7. The mind map will be displayed in the Planning. Nodes with sub nodes are summary activities, nodes without sub nodes are activities

Planning

CREATING A PROJECT PLAN

Concise instructions on the planning of a project:

1. Open a project or create a new one

2. Click on the **Planning** tab

3. Under **Planning**:

   - Click on **New Activity** or **New Milestone**
     *The dialog box **New Activity** or **New Milestone** is displayed.*

   - Enter at least a **Name** and a **Group**

     Enter a **time period** (for an activity) or a **date (**for a milestone)

   - The following can also specified under the **Standard** tab:

     - **Location**

     - **WBS Code** ("Work breakdown structure code"), to permit easier identification of an element

     - **Item cannot be moved on the timeline**
       Specifies that the item is fixed and cannot be postponed or brought forward

   - Enter additional information under the Details tab:

     - **Flag**, for color highlighting

     - **Description** (multiple-line), e.g. for work instructions

     - Progress (for an activity, as a percentage)

4. *Optional:* Select a successor:

   - Click on the **Dependency** tab

   - Select an **available successor** in the list on the left

   - Click on **Add** (**>>**)

5. *Optional:* Add resources:

   - Click on the **Resources** tab

   - Click on **add**
     *The dialog box **New Work Package** is displayed.*

   - Click on the button "..."
     *The dialog box **Select Contact** is displayed.*

   - Select a contact or a distribution list

   - Click on **Select >>**

   - Click on **OK**

   - Specify separately for each resource:

- **Notification** via **InLoox, email**, **task request** or appointment request
  In this case *resources are informed automatically.*

- Change the **workload** (only for an activity)

- Set an individual **price per hour**, if you want to ignore the group rate costs

- This task is already completed indicates whether the resource has completed the assigned work.

- Click on **OK**

- Check the workload if needed

6. Click on **OK** to close the dialog box

7. 💡 Use the mouse to adjust the sequence and duration of elements.
    Hold down the **ctrl key** and **drag** between elements (activities and milestones) to create dependencies

8. 💡 Use the shift key when moving or expanding elements in order not to affect predecessors and successors

9. 💡 Zoom, by holding down the **Ctrl** key and scrolling with the mouse wheel

10. To save the project, click on **Save and Close**

The following symbols may appear alongside the **planning elements**:

- ✔ A check mark shows that the element is **completed**

- ⚠ An alert symbol shows that an element **lies in the past** but has not yet been **completed**

- 🚩🚩🚩 A flag highlights an element

- 📌 A pin shows that an element is fixed, i.e. **cannot be moved** along the timeline

- 👤 The symbol resource shows that resources have been assigned to the element

- 👤✔ The symbol resources have completed work shows that all resources of an element have completed their tasks successfully

- 📎 A paper clip is displayed alongside an element to which documents are linked

Elements can be rearranged as follows:

- ⬆⬇ moves the selected elements upwards or downwards

- ➡ assigns the selected element to the **element** above it
  The element above is automatically incorporated in a grouping.

- ⬅ assigns the selected element one grouping level higher

Continue with Check resource workload

CHECKING RESOURCE WORKLOAD

Concise instructions for checking a resource's workload:

The **Resource Overview** can be called up in three different ways:

- Click on the menu command **Tools >> Resource Overview** in the **InLoox Ribbon Menu/Toolbar**
  *In this case the resource overview shows **all** resources of all existing projects*

- In an opened project:
  *In this case the resource overview shows **all** resources of the selected project*

    1. Open a project or create a new one

    2. Click on the **Resource Overview** button or use the key combination **Ctrl + O**

- In an opened planning element:
  *In this case the resource overview shows **all** resources of the selected activity*

    1. Open a project or create a new one

    2. Switch to the **Planning** section

    3. Click on **New Activity**

    4. Switch to the **Resources** tab

    5. Click on **Workload**
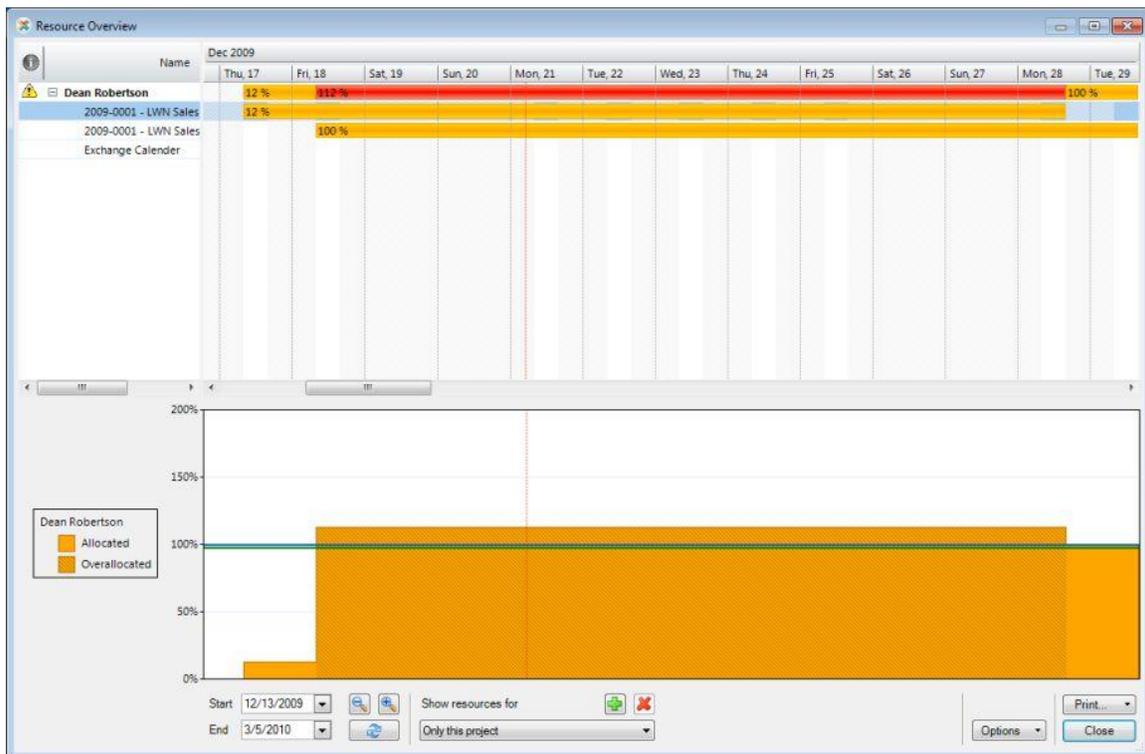
Uses of the **Resource Overview**:

- Check one specific **resource** by clicking on it
  *A graphical overview of the **workload** in the specified time period is displayed*

- A yellow field ( ) indicates that a resource is **occupied but not overloaded** in the specified time period
  A shaded yellow field ( ) indicates that a Resource is **overloaded** in the specified time period

- It is possible to change the workload of a resource by editing the relevant phase

- **enlarges** or **reduces** the view

- **updates** the view

- The option **Show** Exchange Calendar displays or hides the information of the Free/Busy service of Microsoft Exchange Server.
  When display is activated InLoox takes account of the Exchange Server calendar information when calculating the workload

Continue with Display or process work packages

DISPLAYING AND PROCESSING WORK PACKAGES

A brief summary of how to transfer work packages to your calendar or task folder:

If you are planned into an InLoox project, the project planner can pass information to you in various ways:

- by automatic **Outlook task or meeting request**

- by automatic **email**

- by **InLoox**

Option 1: by **Outlook task or meeting request (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.

2. You see the following **planning data**:

- **Project name** and **number**

- **Time frame or date**

- Your own **effort**

- **Location**

- involved **resources**

3. You have the following options:

- **agree**, whereupon Outlook automatically creates an entry in your **task list** or **calendar.**

- **decline**

Outlook reports the response to the project planner. In the case of a task request the project planner is kept constantly formed about the progress of and changes to all tasks assigned to you.

Option 2: by **email (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.

2. You see the **planning data**:

- **Project name** and **number**

- **Time frame or date**

- Your own **effort**

- **Location**

- involved **resources**

3. You have the following options:

- **accept** and create an entry in your **calendar or task list** manually.

- **decline** and reply in free form via your email software.

Option 3: by **InLoox task (*)**

1. *Outlook displays the dialog box* **InLoox work package**:

2. Click on an entry in the list. You see the **planning data**:

- **Project name** and **number**

- **Time frame or date**

- Your own **effort** (in hours)

- Current synchronization

3. Click on one of the following:

- **Task list**
  InLoox work package is also synchronized with personal Outlook task list

- **Calendar**
  InLoox work package is also synchronized with personal Outlook calendar

- **Open details**
  Further information on the task is displayed

- **Open project**
  The project is opened

4. You see the open InLoox tasks in the **InLoox Task Overview**. You are **informed automatically of any changes.**

(*) The type of communication is selected by the project planner. Users without InLoox can only be informed via **task request, meeting request or email**. The project planner can also decide to withhold information from a resource.

Continue to Storing files and documents

STORING FILES AND DOCUMENTS

A brief summary of how to assign files, Outlook objects and internet addresses to a project:

1. Open a project or create a new one

2. Click on the button **New** in the **Document** tab
    *It may be necessary to enter the project number and the customer name in the **Management** tab.*
    *The dialog box **New Document** is displayed.*

3. Proceed as follows:

    -   Select a **type**, e.g. **file**

    -   Specify the **path** of the document. Click on the button "**...**" to open a search window

    -   Specify whether InLoox should copy the document **into the project folder** (recommended)

    -   Select a **time tracking entry** to link the document to that entry.
        InLoox displays a **paper clip** (📎) on the tab Time Tracking next to the specified entry

    -   Add other information as appropriate:

        -   **Status**, e.g. **complete** or **awaiting release**

        -   **Notes** (multiple lines), for comments and remarks

    -   Click on **OK**
        InLoox copies the document into the project folder automatically if so specified.

4. **Tip**: Documents can be added to the list with **Drag and Drop**

5. Click on **Save and Close**

Alternative method: **Save directly from mail inbox**

1. Select an **email** from your personal Outlook inbox for example

2. Click on the button **Add element** in the **InLoox Ribbon Menu / Toolbar**
    *The dialog box **Add to Project** is displayed.*

3. Select a **project**

4. Activate the option **Add to document folder**

5. Specify how InLoox should process any attachments
    Details of this feature are to be found under Attachment management.

6. Click on **OK**

Continue with Create a budget

Working with Budgets

CREATING A BUDGET

A brief summary of how to create a new budget document:

1. Open a project or create a new one

2. Click the tab **Budget**

3. Create a new document in the **Budget** area:

   - Click on **New >> Revenues (planned)**
     *The dialog box **New Planned Revenue** is displayed.*

   - Specify a **Date**

   - Select the **Status**, e.g. **open**

   - Enter a **Name**, e.g. **Estimation** or **Customer offer**

   - You can also add **positions** from an existing document belonging to the same project (e.g. Expense (planned)).
     Details of this feature can be found under Add Budget Position

   - Click on **OK**
     InLoox creates a new budget.

4. Add an **item** manually:

   - Click on **New Budget Position** on the ribbon
     *The dialog box **New Position** is displayed:*

   - Select a **Group**

   - Select a **Position**
     InLoox loads the data from the InLoox positions

   - Change the **Name**, **description**, **Quantity**, **Unit price** or **Amount** as required

   - Click on **OK**

5. Optional: Create a report for the budget:

   - Flag one budget in the list at left. Click on **Report...**

   - Select a report

   - Output the budget to Excel or as a PDF or Word document or send it by email

6. Click on **Save and Close**

Continue with Create an invoice

ADDING POSITIONS

Information about the processing of budget positions in InLoox budgets:

When an InLoox project already contains budget information, it is usually more efficient to copy positions than to create new ones. Items can be copied from one document to another in two ways:

- within an project: using the option **copy positions** in the dialog box **New Budget/Edit Budget** under the **Budgets** tab

- from one project to another via the **Windows clipboard**

Below is an overview of the various methods:

Method	Action	Remarks
Add **all** positions	Copies *all* positions of a budget document (e.g. revenues (planed)) to another budget document (e.g. revenues actual)	Only possible within a given project. A simple way for copying a budget document, e.g. for a new version of an existing revenue or expense. **Note:** To be as flexible as possible, InLoox supports multiple billing of positions but reports the activity correspondingly (e.g. for part invoices and payments on account)
Add **Non-billed** positions	Copies *non-billed* positions of a budget document (e.g. revenues (planed)) to another budget document (e.g. revenues actual)	Only possible within a given project. Ideal for ongoing billing of activities and expenses
Clipboard (copy & paste)	Copies one single position from a budget of one project to a budget (of another or the same project)	Cross-project copying enables you to re-use positions which have already been created elsewhere

PROJECT CONTROLLING

Concise instructions on project controlling:

Tabular overview:

1. Open a project

2. Click **Budget Overview** section

3. Click on the button **Table.**
   The tabular overview area is displayed

4. In the tabular **overview** area you will see the figures cumulated by **Group**
   Details can be found under **Budget Overview**

5. Optional: export the report to Microsoft Excel:

   - Click on **Reports >> Budget Overview**

   - Print the report or send it by email

6. Click **Save and Close**

Further instructions on project controlling:

- Check the totals under the columns **Actual expenses (time tracking), Actual expenses (other), Actual revenues** and **Actual margin**

- A line marked in red (🔴) shows an anticipated **negative result**

Use specific views to carry out controlling for more than one project at once:

1. Click **Projects** in the **InLoox Ribbon Menu** or **InLoox Folder** in the **InLoox Toolbar**
   Outlook switches to the InLoox project overview

2. Select a **view** from the **InLoox Toolbar**, e.g. **Project controlling**

3. Double-click to open the required project

Graphical overview:

1. Open a project

2. Click **Budget Overview** section

3. Click on the button **Chart.**
   The graphical overview area is displayed

4. You have the opportunity to view different budget charts. Choose the desired diagram in the **Chart Type** area. (**By Type**, **By Group**, **By Date**, **Expense vs. Revenue**)

5. You can show and hide some chart series by selecting/deselecting them in the Chart Data area.

💡 Hint:

To carry out controlling for more than one project at once, use the Dashboard view.

1. Click **Projects** in the **InLoox Ribbon Menu** or **InLoox Folder** in the **InLoox Toolbar**
   Outlook switches to the InLoox project overview

2. Select **Dashboard**

Continue with Locking and completion of projects

CREATING AN ACTUAL REVENUE

Concise instructions on creating an actual revenue:

1. Open a project or create a new one

2. Click on the **Budget** section

3. Create a new budget in the **Budget** area:

    -   Click on **New Actual Revenue**
        *The dialog box **New Actual Revenue** is displayed:*

    -   Enter a **Date**

    -   Select the **Status**, e.g. **open**

    -   Enter a **Name**, e.g. **Invoice** or **20% discount**

    -   You can also add **positions** from an existing document (e.g. Revenues (planned)) from the same project.
        Details of this feature can be found under Adding budget positions.

    -   Click on **OK**
        InLoox creates a new Budget.

4. Add an **item** manually:

    -   Click on **New Budget Position** on the ribbon
        *The dialog box **New Position** is displayed:*

    -   Select a **Group**

    -   Select a **Position**
        InLoox loads the data from the InLoox positions

    -   Change the **Name**, **description**, **Quantity**, **Unit price** or **Amount** as required

    -   Click on **OK**

5. Optional: Create a report for the budget:

    -   Flag one budget in the list at left. Click on **Report...**

    -   Select a report

    -   Output the budget to Excel or as a PDF or Word document or send it by email

6. Click on **Save and Close**

Continue with Project controlling

CREATING A REPORT

A brief summary of how to create a report:

1. Click **Projects** in the **InLoox Ribbon Menu / Toolbar**
   *Outlook switches to the **InLoox project overview.***

2. Select one or more projects from the list with the mouse

3. Click **Reports >> Create Report** in the **InLoox Ribbon Menu / Toolbar**
   Details of the report generator are to be found under Creating and editing reports

4. Select a **report template** from the list and click **OK**

   - InLoox transfers the data - for example to Excel, Word or Adobe PDF

   - Print the document or send it by email

Continue to Define views

DEFINING VIEWS

A brief summary of how to create and save views:

1. Click the **InLoox** tab and then **Projects** in the **InLoox Ribbon Menu** or **InLoox Folder** in the **InLoox Toolbar**
   Outlook switches to the InLoox project overview

2. Change the view in the InLoox project overview (e.g. filter, sort, grouping, field selection)

3. Click **Save current view as** in the **InLoox Ribbon Menu / Toolbar** (under **More Views**)

   1. Enter a **view name**

   2. Select whether the view is for **all users** to see or just for yourself

   3. Click **OK**
      The new view is created

Continue to Create a new project

Basics

INLOOX BASICS

To Outlook 2003/2007 View
Outlook 2010 View

This chapter contains a description of the structure and basic features of InLoox. Basic knowledge of Microsoft Outlook is required.

If you have any general questions about the installation or operation of Outlook, please refer to the Microsoft Outlook Help or ask your system administrator.

The structure of InLoox is very simple and consists of the following:

1. the **InLoox Ribbon Menu**, which is displayed at all times

2. the **Projects**, an overview of your InLoox projects

3. the individual **InLoox Projects**, which are to be found in the Project overview

4. the **InLoox Task Overview**, which shows currently open and completed work packages

5. the InLoox Quick Access Panel, with extensive project interaction

6. the **InLoox Options**, which govern base parameters and permissions

Important:

- Users should read the chapter on **Everyday tasks** thoroughly

- Administrators should also read the chapter on **Detailed information**

To Outlook 2010 View
Outlook 2003/2007 View

This chapter contains a description of the structure and basic features of InLoox. Basic knowledge of Microsoft Outlook is required.

If you have any general questions about the installation or operation of Outlook, please refer to the Microsoft Outlook Help or ask your system administrator.

The structure of InLoox is very simple and consists of the following:

1. the **InLoox Toolbar**, which is displayed at all times

2. the **InLoox Folder**, an overview of your InLoox projects

3. the individual **InLoox Projects**, which are to be found in the Project overview

4. the **InLoox Task Overview**, which shows currently open and completed work packages

5. the InLoox Quick Access Panel, with extensive project interaction

6. the **InLoox Options**, which govern base parameters and permissions
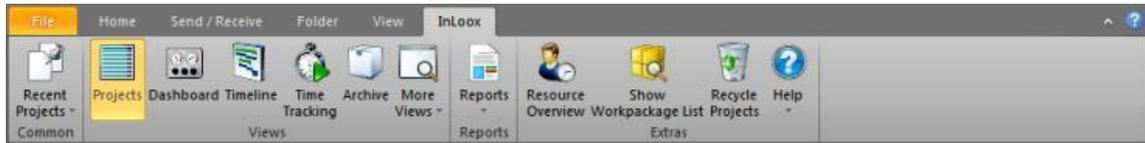
Important:

- Users should read the chapter on **Everyday tasks** thoroughly

- Administrators should also read the chapter on **Detailed information**

InLoox Toolbar

INLOOX RIBBON MENU

Once the **InLoox installation** has been successfully completed on your computer you will see the **InLoox Ribbon Menu** in Outlook 2010:

The **InLoox Ribbon Menu** is always displayed and provides the following commands:

1. **Recent Projects**: displays a list of projects, organized by project number, opened most recently. A maximum of ten projects is stored per user. A click on an entry opens the project, provided it has not been deleted in the meantime. This feature provides faster access to projects you are currently working on.

2. **Projects**: switches to the **InLoox Project Overview** in the InLoox Folder. The InLoox Folder is comparable to an email, calendar task folder. The InLoox Folder can be located on a network server or on your own hard disk, depending on the version installed.

3. **Dashboard**: Dashboard gives you an overview of important information to all projects.

4. **Timeline**: InLoox shows you all projects in chronological order on a Timeline.

5. **Time tracking**: switches to the Time Tracking List, which shows all project items for which you have permission.

6. **Archive**: shows you all archived projects.

7. **More Views**: provides a list of different versions of the project overview and includes view customizing. It is possible to set up common views for all users or personalized views just for your own use.

8. **Reports**: transfers the data from a project to a variety of document and file formats. Select one or more projects from the **InLoox Project Overview** and click on **Reports >> Create Report**. You can store your own report definitions (e.g. filters). Further information can be found in the chapter on Creating and Editing reports

9. **Resource Overview**: in the Resource Overview you can see all resources of all existing projects.

10. **Show Work package List**: shows you your personal work package overview. Open work packages will be generated from the project plan and displayed in this overview.

11. **Recycle Projects**: all projects, which were deleted in the project overview, you can find in the Recycle Projects.

12. **Help**: calls up this online document.

INLOOX TOOLBAR

Once the **InLoox installation** has been successfully completed on your computer you will see the **InLoox Toolbar** in Outlook 2003/2007:

The **InLoox Toolbar** is always displayed and provides the following commands:

1. **InLoox Folder**: switches to the **InLoox Project Overview** in the InLoox Folder. The InLoox Folder is comparable to an email, calendar task folder. The InLoox Folder can be located on a network server or on your own hard disk, depending on the version installed.

2. **Recent Projects**: displays a list of projects, organized by project number, opened most recently. A maximum of ten projects is stored per user. A click on an entry opens the project, provided it has not been deleted in the meantime. This feature provides faster access to projects you are currently working on.

3. **Current View**: provides a list of different versions of the project overview and includes view customizing. It is possible to set up common views for all users or personalized views just for your own use.

4. **Add to Project...**: select for example an email or a calendar entry. A click opens the dialog box to record a **time tracking entry** or **document** for a project. It is possible to post emails, tasks, contacts, journal entries and calendar entries directly from Outlook to a project. Further information can be found in the chapter on Adding an element.

5. **Reports**: transfers the data from a project to a variety of document and file formats. Select one or more projects from the **InLoox Project Overview** and click on **Reports >> Create Report**. You can store your own report definitions (e.g. filters). Further information can be found in the chapter on Creating and Editing reports

6. **Tools**: this is where for example supplementary functions such as the **InLoox Options** can be called up or the user interface language defined. In the **InLoox Workgroup** and **Enterprise Edition** some of these commands are reserved for the InLoox administrator.

HINTS: ADDING ELEMENTS

To Outlook 2003/2007 View
Outlook 2010 View

A few practical hints to assist the everyday use of the button **Add element**:

- Maintain data promptly - especially when many activities have to be recorded per day. Advantage: nothing gets forgotten, you colleagues can always see the latest situation and you save yourself trouble of the awkward reconstruction work and the end of the day or month. The project is always fully documented

- Keep your calendar in such a way you can always show it to a third party without having to explain this or that entry. Proper recording of time, work and documentation is automatic, since time record entry descriptions do not have to be written anew each time. You also benefit from a clearer overview of your daily work

- Post entries that are related to more than one project separately for each one. Do not forget to allocate the time correctly

- Microsoft Outlook creates journal entries automatically for work with Office documents (e.g. Word, Excel or PowerPoint) and records also how long the documents were **open**. Use the journal entries as a memory aid for recording work and time in InLoox

    Automatic time recording for Outlook journal entries is carried out as follows:

    1. Click the **File** tab

    2. Click **Options**

    3. On the **Notes and Journal** tab click on the button **Journal Options...**

    4. The list **Also record files from** shows all installed Microsoft Office products. Activate all entries.

    5. Click on **OK**

    Now you can post the automatically created journal entries in the usual manner using the button **Add element** in the **InLoox Ribbon Menu**. The duration is automatically recorded by InLoox. **Important:** Check for each posting that the times automatically recorded by Outlook are correct. It can be that the document was not being viewed for the whole time it was opened.

To Outlook 2010 View
Outlook 2003/2007 View

A few practical hints to assist the everyday use of the button **Add element**:

- Maintain data promptly - especially when many activities have to be recorded per day. Advantage: nothing gets forgotten, you colleagues can always see the latest situation and you save yourself trouble of the awkward reconstruction work and the end of the day or month. The project is always fully documented

- Keep your calendar in such a way you can always show it to a third party without having to explain this or that entry. Proper recording of time, work and documentation is automatic, since time record entry descriptions do not have to be written anew each time. You also benefit from a clearer overview of your daily work

- Post entries that are related to more than one project separately for each one. Do not forget to allocate the time correctly

- Microsoft Outlook creates journal entries automatically for work with Office documents (e.g. Word, Excel or PowerPoint) and records also how long the documents were **open**. Use the journal entries as a memory aid for recording work and time in InLoox

   Automatic time recording for Outlook journal entries is carried out as follows:

   1. Click on **Tools >> Options** in the Outlook menu

   2. On the tab **Preferences** click on the button **Journal Options...**

   3. The list **Also record files from** shows all installed Microsoft Office products. Activate all entries.

   4. Click on **OK**

   Now you can post the automatically created journal entries in the usual manner using the button **Add element** in the **InLoox Toolbar**. The duration is automatically recorded by InLoox. **Important:** Check for each posting that the times automatically recorded by Outlook are correct. It can be that the document was not being viewed for the whole time it was opened.

ADDING AN OUTLOOK ELEMENT TO INLOOX

A significant advantage of InLoox is its close integration with Outlook. To record activities (dates and effort) and documents (e.g. emails or attachments) for a project, use the button **Add to Project...** in the **InLoox Ribbon Menu / Toolbar**.

Detailed information on the recording of entries can be found in the chapter on Hints: adding elements.

Proceed as follows:

1. Select for example an email from your personal Outlook inbox (or any other folder)

2. Click on the button **Add to Project...** in the **InLoox Ribbon Menu / Toolbar**
   *The dialog box **Add to Project** is displayed.*

   3.

4. Select a **project**

5. Select the action to be taken:

- **Create new item**
  Time tracking items are records of time spent for a project e.g. work carried out

- **Add to document store**
  Documents are files assigned to a project

  1. Select the **Operation** InLoox is to carry out with the attachment - if any
     Details of this feature can be found in the chapter Attachment Management

  2. Select if required a **Subfolder**

  3. Select **Link document with time tracking item**

     InLoox will then display a paper clip (📎) in Time tracking item under the **Time Tracking** tab.
     The paper clip can be used later to access all documents linked to the time tracking item.

6. Click on **OK**
   *If the option **Create new item** was selected, the dialog box **New Item** is displayed.*

7. Please enter at least the following:

   - **Date** and **Time** (these are set automatically and can be changed if needed)

   - **Duration**

   - **Group**, to which the item belongs
     or alternatively the **activity** to which the item belongs

8. Click on the button **OK**

Note

The following standard elements can be posted directly to an InLoox project: emails, contacts, tasks, journal entries and calendar entries.

ℹ️ Non-standard message types are **not** supported by InLoox.

Hint

It is possible to customize the project list view. Click with the right-hand mouse button on a column header. A **popup menu** is displayed. Insert new fields or hide insignificant ones with the command **Choose fields**. Filter the project list with the command **Display filter**.

ATTACHMENT MANAGEMENT

Information on using InLoox in connection with Outlook elements *with attachment*.

When you insert an Outlook element with attachment into an InLoox project, there are various options for handling the attachment.

Outlook elements such as emails, tasks or calendar entries can be inserted via the **InLoox Ribbon Menu /Toolbar** using the button **Add to Project...** or via an opened **InLoox project** using the **Document** tab

The **example of an email** is shown to help you select the most useful method:

Method	Action	Pros & cons
Element with attachment	InLoox assigns the email and the attachment *in file form* to a project. (Outlook does the same.)	Email and attachment are stored together. The document list shows whether the element is carrying an attachment but no details of the attachment, such as name or type.
Element without attachment	InLoox assigns *only* the email to the project. All attachments will be removed.	Saves storage space. Attachments can neither be displayed nor saved in InLoox.
Attachment only	InLoox assigns *only* the attachment to the project. The email is discarded.	Removes superfluous correspondence. Correspondence (including notes) can neither be read nor saved in InLoox.
Element and attachment separately	InLoox assigns the email and attachment to the project *separately*.	Correspondence is kept. Attachments can be seen in the document list with name and type. Relationship between correspondence and attachments is lost.

CREATING AND EDITING REPORTS in INLOOX RIBBON

To Outlook 2003/2007 View
Outlook 2010 View

Under **Reports** in the **InLoox Ribbon Menu** it is possible to issues reports such as project summaries or budget lists in a variety of file formats. .

To create a report

1. Select one or more projects from the **InLoox Project Overview**

2. Click on **Create Report...**
   *The dialog box **New Report** is displayed*
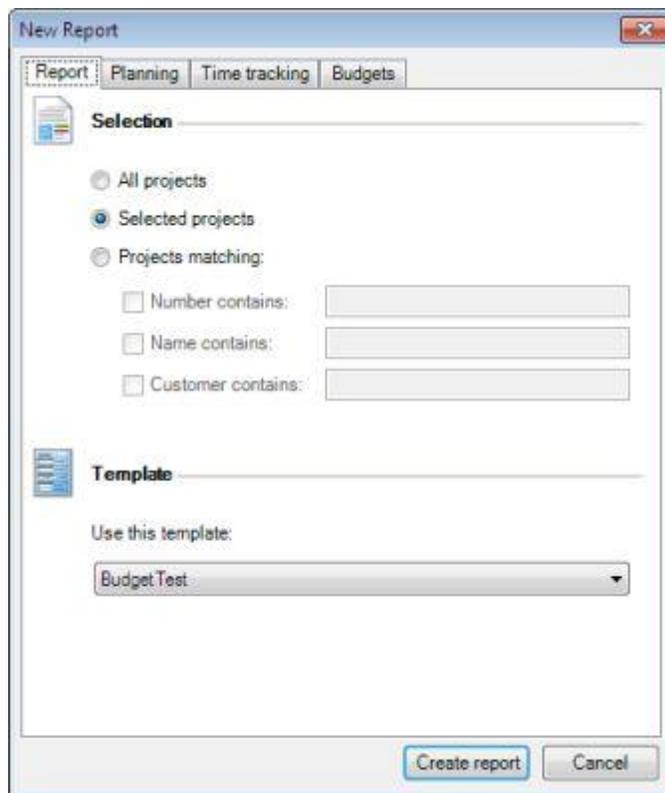
3. Specify the **Selection** and select a **Template**

4. Optional: Filter the report data

5. Optional: **Save** the report for faster access
   Details can be found in the chapter on Saving reports

6. Click on **OK**
   InLoox creates the report. The dialog box Output Parameters is displayed.

7. Select the required **Output Parameters** and click on **OK**

To Outlook 2010 View
Outlook 2003/2007 View

Under **Reports** in the **InLoox Toolbar** it is possible to output analyses and summaries in a wide variety of file formats.

To **create a report**

1. Select one or more projects from the **InLoox Project Overview**

2. Click on **Create Report...**
   *The dialog box **New Report** is displayed*
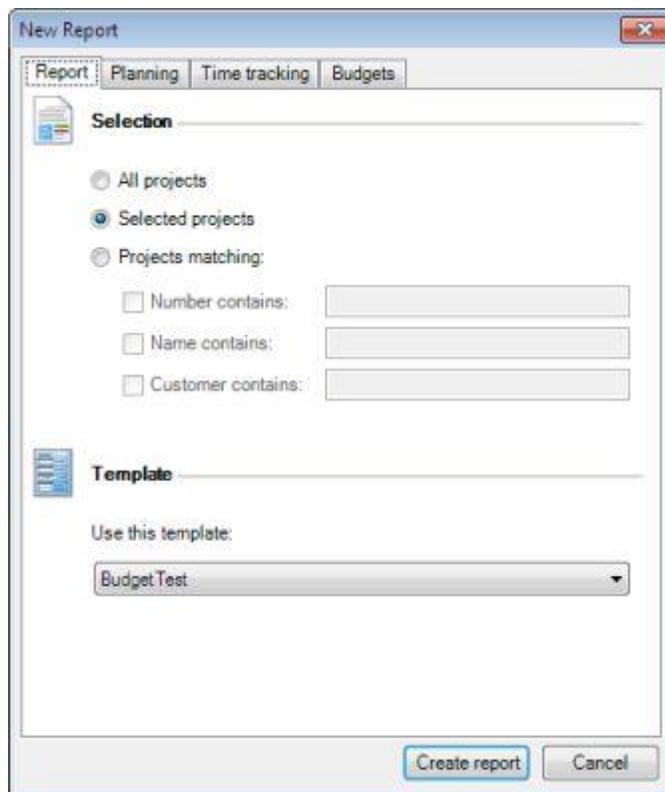
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   Details can be found in the chapter on Saving reports

6. Click on **OK**
    InLoox creates the report. The dialog box Output Parameters is displayed.

7. Select the required **Output Parameters** and click on **OK**

FILTERING REPORT DATA

To Outlook 2003/2007 View
Outlook 2010 View

Under **Reports** >> **Create report** in the **InLoox Ribbon Menu** issues reports such as project summaries or budget lists in a variety of file formats.
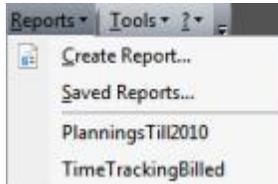
Filtering Data

1. Data can be filtered in the dialog **New Report**:
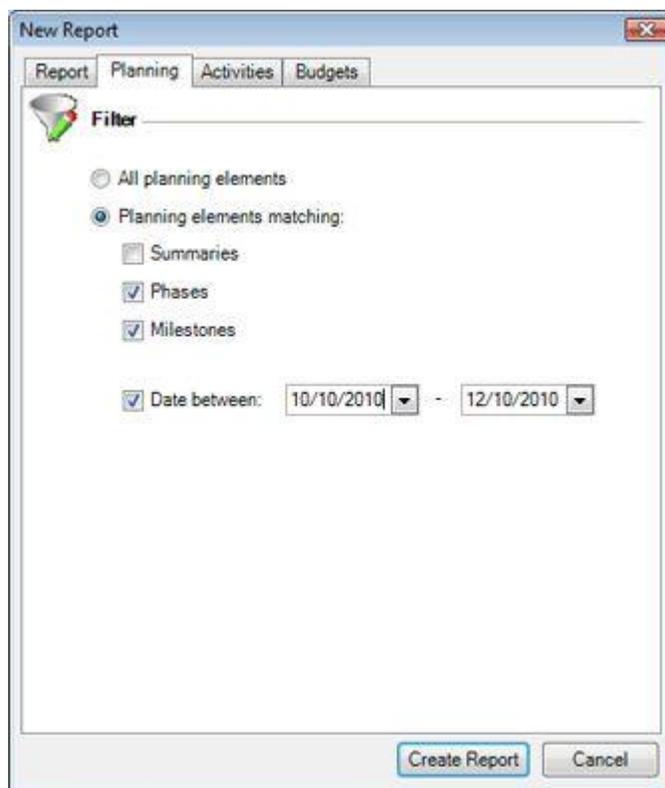
Filter for the Planning Page:

- Select **All planning elements** to include the complete list of planning elements

- Select **Following planning elements** to filter:

- **Summaries**, to transfer summary elements (activities with sub-elements)

- Filter **Activities** and **Milestones** by switching off the relevant parameters

- The time interval can also be restricted by specifying ("**Date between**")
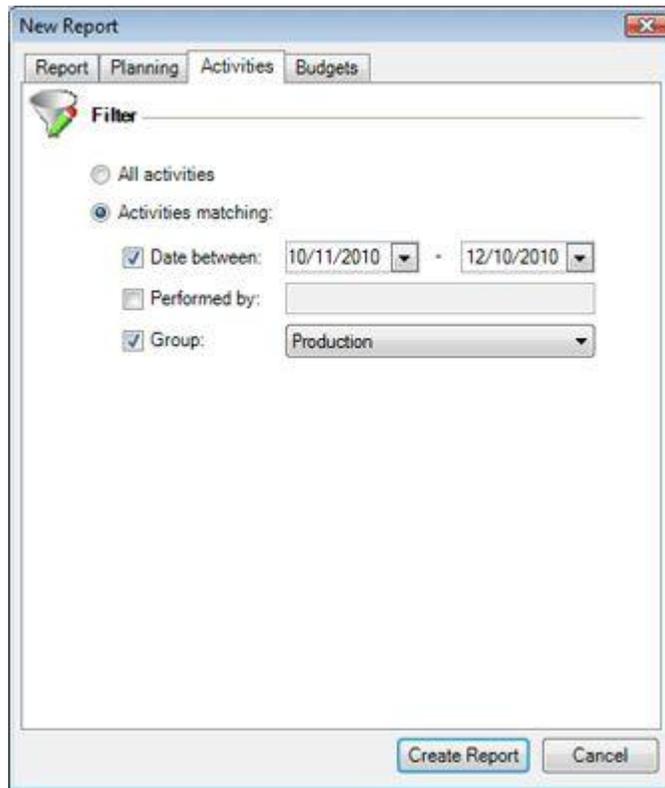
Filter for the Time tracking Page:

- Select **All entries** to include the complete list of time tracking entries

- Select **Following time tracking entries** to filter:

  - by **date interval**

  - by name of person **carrying out** the time tracking item

  - by **group**

Filter for the Budget Page:

- Select **All Budgets** to include the complete list of budgets and budget position

- Select Following budgets only to filter:

    - by type (**Expense (actual, time tracking), Expense (actual, other), Revenues (plan), Expense(plan), Revenues (actual)**)

    - by **date interval**

    - by **budget state**

    - by **billing state** of each position

To Outlook 2010 View

Outlook 2003/2007 View

Under **Reports** >> **Create report** in the **InLoox Toolbar** it is possible to output analyses and summaries in a wide variety of file formats.

Filtering Data

1. Data can be filtered in the dialog box **New Report** in a number of ways:

Filter for the Planning Page:

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FILTERING REPORT DATA

To Outlook 2003/2007 View
Outlook 2010 View

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    - by **date interval**

    - by **budget state**

    - by **billing state** of each position

To Outlook 2010 View
Outlook 2003/2007 View

Under Reports >> Create report in the InLoox Toolbar it is possible to output analyses and summaries in a wide variety of file formats.

Filtering Data

1. **Data can be filtered in the dialog box New Report in a number of ways:**

Filter for the Planning Page:

- **Select All planning elements to include the entire list of planning elements**

- **Select Following planning elements only to filter:**

    - **Summaries, to transfer summary elements (activities with sub-elements)**

    - **Filter Activities and Milestones by switching off the relevant parameters**

    - **The time interval can also be restricted by specifying ("Date between")**

Filter for the Time tracking Page:

- **Select All entries to include the entire list of time tracking entries**

- **Select Following time tracking entries only to filter:**

  - **by date interval**

  - **by name of person carrying out the time tracking item**
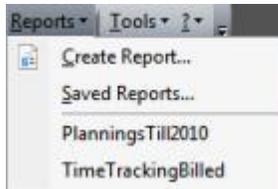
  - **by group**

Filter for the Budget Page:

- **Select All Budgets to include the entire list of budgets and Budget position**

- **Select Following budgets only to filter:**

  - **by type (Expense (actual, time tracking), Expense (actual, other), Revenues (plan), Expense(plan), Revenues (actual))**

  - **by date interval**

  - **by budget state**
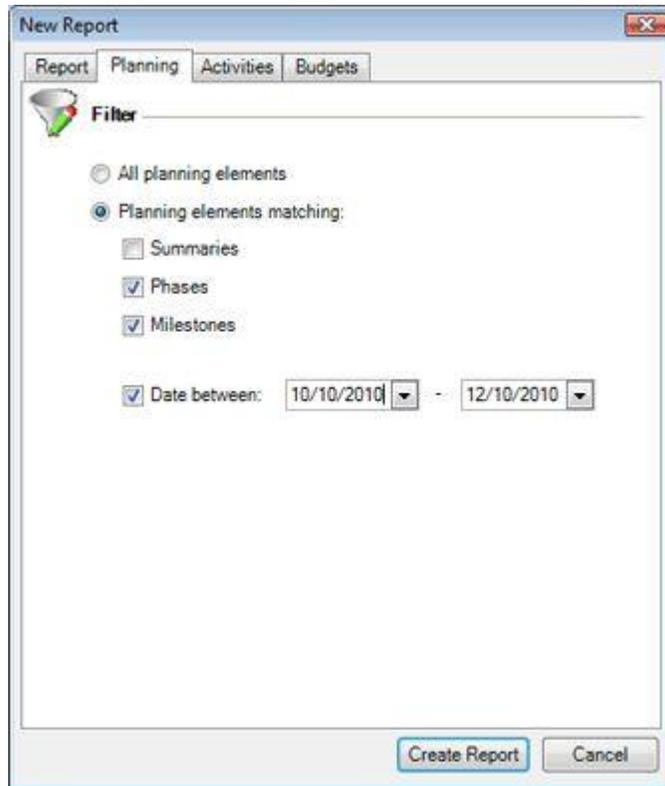
  - **by billing state of each position**

InLoox Project Overview

INLOOX PROJECT OVERVIEW

To Outlook 2003/2007 View

Outlook 2010 View

Click Projects in the **InLoox Ribbon Menu**. A project overview is displayed. Each entry shows the information on one project. Only authorized users can see a project.

Information on daily work can be found in the chapter on Hints on the InLoox project overview

Important **features** of the project list include:

- A double-click on **an entry opens** an existing **InLoox project**

- A double-click on **an empty field creates** a new **InLoox project**

- A keystroke switches to the project whose name begins with the **corresponding letter**

- The search list permits any information, including within a project, to be found quickly

The **format** is as follows:

- ~~struck through~~ projects are completed or discontinued.
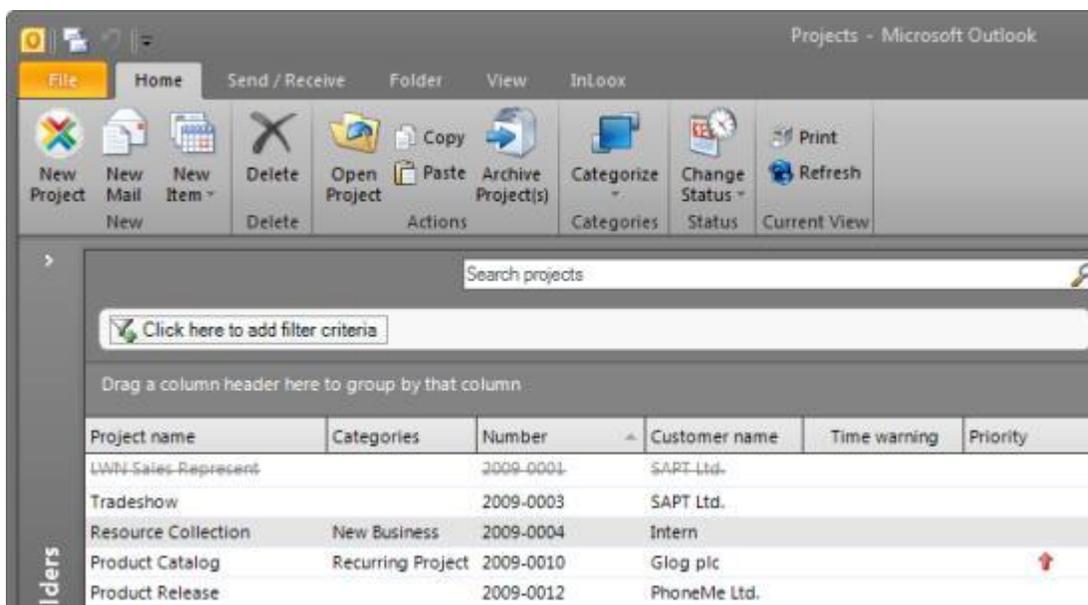
Sample view:

The following short-cut keys are available for the project overview:

- F4: create new InLoox project

- F2: update project list

- Ctrl + P: print project list

- Ctrl + A: select all projects

To Outlook 2010 View

Outlook 2003/2007 View

Click on InLoox Folder in the **InLoox Toolbar**. A project overview is displayed. Each entry shows information on one project. The normal display includes all projects for which you have permission

Information on daily work can be found in the chapter on Hints on the InLoox project overview

Important **features** of the project list include:

- A double-click on **an entry opens** an existing **InLoox project**

- A double-click on **an empty field creates** a new **InLoox project**

- A keystroke switches to the project whose name begins with the **corresponding letter**

- The search list permits any information, including within a project, to be found quickly

The **format** is as follows:

- projects ~~striked out~~ are completed or discontinued.

Sample view:

The following short-cut keys are available for the project overview:

- F4: create new InLoox project

- F2: update project list

- Ctrl + P: print project list

- Ctrl + A: select all projects

INLOOX DASHBOARD

To Outlook 2003/2007 View
Outlook 2010 View

The dashboard view shows you the main project areas. You can get all important information to the projects without opening one. Each user can compose his own dashboard view from different widgets.

Click **Dashboard** in the **InLoox Ribbon Menu**.
Choose widgets via the **Widgets** button for your personal dashboard view.
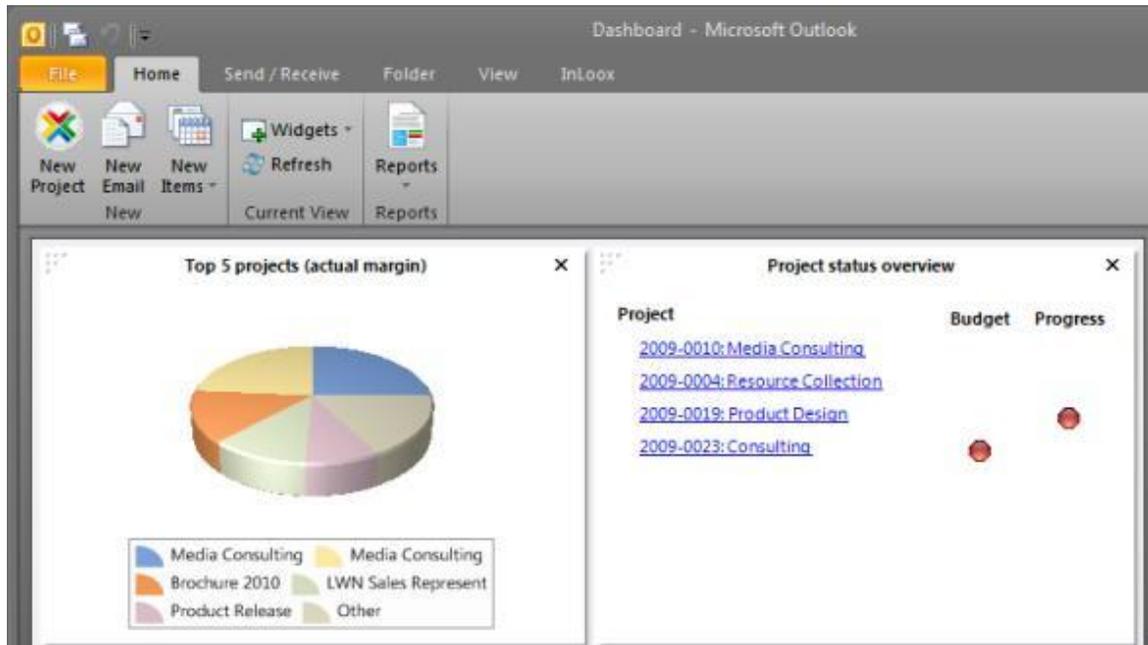
Widget	Description
My open work packages	Shows you all your open InLoox work packages
Project manager view (open packages)	Shows you as a project manager all your open InLoox work packages related to your projects
Recent projects	Shows the last 7 recently opened projects
Recent created projects	Shows the last 7 recently created projects
Customer distribution (all projects)	Shows all customers related to your projects
Status distribution (all projects)	Shows the status of all your projects
Plan/actual comparison	Shows planned and actual hours of your projects
Actual margin (month)	Shows the system wide project profit of the current month and last 11 months
Actual margin (quarter)	Shows the system wide project profit of the current quarter and last 3 quarters
Actual margin (year)	Shows the system wide project profit of the actual and the last years
Actual expenses/actual revenues (month)	Shows the system wide actual expenses and actual revenues of the current month and last 11 months
Actual expenses/actual revenues (quarter)	Shows the system wide actual expenses and actual revenues of the current quarter and last 3 quarters

Actual expenses/actual revenues (year)	Shows the system wide actual expenses and actual revenues of the actual and the last years
Top 5 Projects (actual margin)	Shows a ranking of the top 5 most profitable projects
Project status overview	Shows an overview of the progress and the cost-effectiveness of your projects

To Outlook 2010 View
Outlook 2003/2007 View

By using the Dashboard, you are being able to track the areas of your project in an overview. Each user can configure the view by their own.
With the Dashboard, it is accomplish a quick overview over all projects without opening every single of them.

Switch to the Dashboard view by clicking the Dashboard button in the view control of the InLoox folder.
Choose the widgets you would like to display in the overview panel via the **Widgets** button
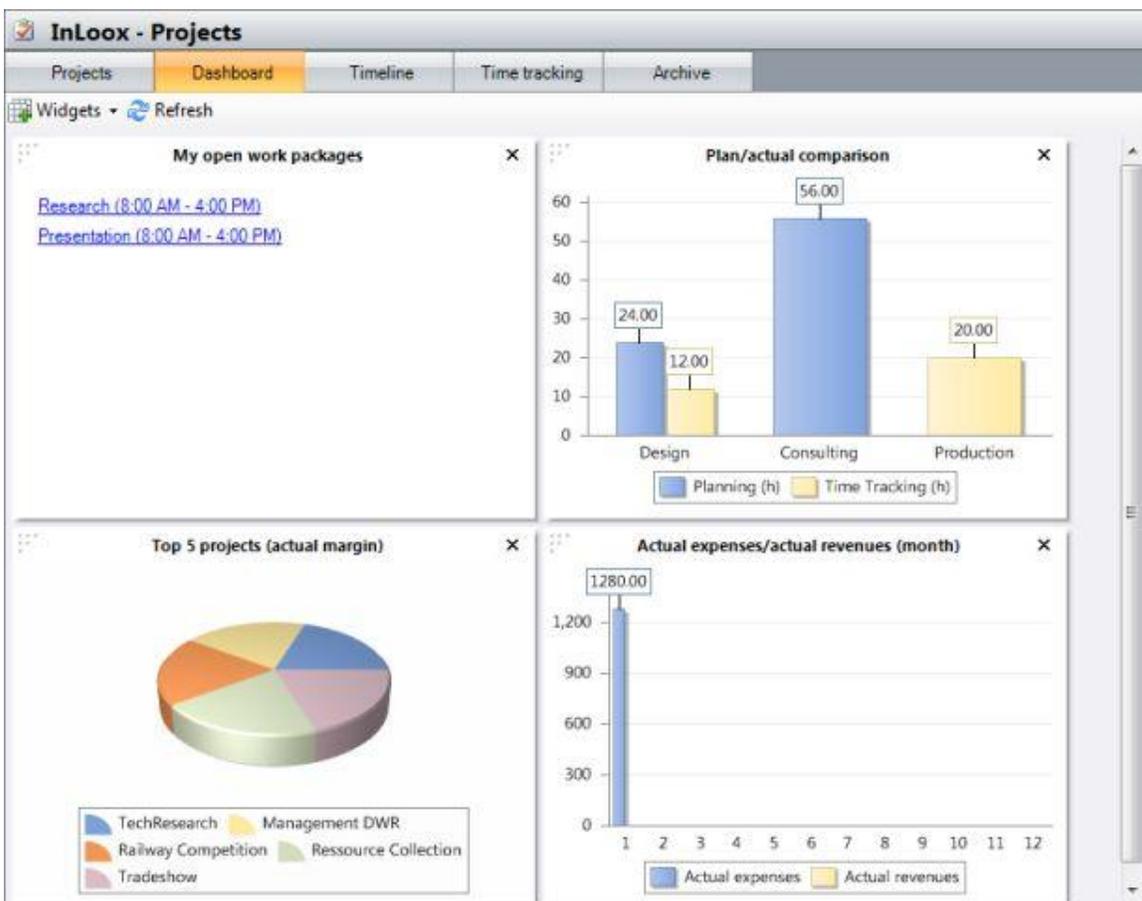
Widget	Description
My open work packages	See all your open InLoox work packages with one view
Project manager view (open packages)	See all open InLoox work packages related to your projects you are project manager
Recent projects	See the last 7 recently opened projects
Recent created projects	See the last 7 recently created projects

Customer distribution (all projects)	See all customers related to your projects
Status distribution (all projects)	see the status of all your projects
Plan/actual comparison	See planned and actual hours of your projects
Actual margin (month)	See the system wide project profit of the current month and last 11 month
Actual margin (quarter)	See the system wide project profit of the current quarter and last 3 quarters
Actual margin (year)	See the system wide project profit of the actual and the last year
Actual expenses/actual revenues (month)	See the system wide actual expenses and actual revenues of the current month and last 11 month
Actual expenses/actual revenues (quarter)	See the system wide actual expenses and actual revenues of the current quarter and last 3 quarters
Actual expenses/actual revenues (year)	See the system wide actual expenses and actual revenues of the actual and the last year
Top 5 Projects (actual margin)	See the top 5 of the projects which actual margin the most
Project status overview	See an overview of the progress and the cost-effectiveness of your projects

Timeline

INLOOX TIMELINE

To Outlook 2003/2007 View
Outlook 2010 View

Click **Timeline** in the **InLoox Ribbon Menu**. This view shows you the time flow of your projects on the timeline. You can choose the visible time range by the buttons ().

In the **InLoox Ribbon** under **Start >>>** You are able to customize the timeline view. Choose day, week or month view.

Projects on the timeline could be grouped by different criteria.

The menu:

Element	Description
New Project	Creates a new InLoox project
Delete	Deletes selected InLoox project
Open Project	Opens an existing InLoox project
Copy	Copies current selected project to clip board
Paste	Pastes project from clip board to current timeline
Categorize	Choose **Key Project**, **New Business** or **Recurring Project**
Change Status	Defines the project status
Print	Prints current **timeline**
Refresh	Refreshes the **timeline**
Today	Switches to current date
	Switches **timeline** to day view
	Switches **timeline** to week view
	Switches **timeline** to month view
	Zoom in accordingly zoom out time rage of the **timeline**
Group	Opens the **Group dialog**, which allow to group projects by different criteria

Important **features** of the **timeline**:

- A **double click** on the selected project **opens** it

- A **double click** on the white background area creates a new project

The following short-cut keys are available for the timeline:

- **F4:** create new InLoox project

- **F2:** update project list

- **Ctrl + P**: print project list

- **Ctrl + A**: select all projects

- **Ctrl + C**: copy selected projects to clip board

- **Ctrl + V**: copy projects in clip board to project list

To Outlook 2010 View
Outlook 2003/2007 View

Click on the InLoox folder in the **InLoox Toolbar**. Change the view from the current view to **timeline**. The InLoox folder offers a simple way to view your projects in a schedule by the timeline view
You can choose the visible time range by the buttons.

In the **InLoox Toolbar** under **Current View >>> Projects in timeline view** you are able to look at your projects in timeline. Inside of the timeline the projects are movable, start and end of a project will be adapted.

Projects on the timeline could be grouped by different criteria.

Element	Description
New Project	Creates a new InLoox project
Open	Opens an existing InLoox project
Delete	Delete selected **InLoox projects**
Reload	Reload the **timeline**
Print	Prints current **timeline**
Today	Switch to current date
	Switch **timeline** to day view
	Switch **timeline** to month view
	Switch **timeline** to year view
	Zoom in accordingly zoom out time rage of the **timeline**
Group...	Opens the **Group dialog**, which allow to group projects by different criteria
	Copies current selected project to clip board
	Paste project from clip board to current timeline

Important **features** of the **timeline**:

- A **double click** on the selected project **opens** them

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The following short-cut keys are available for the timeline:

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- **Ctrl + V**: copy projects in clip board to project list

TIMELINE: GROUP DIALOG

Detailed information for page **Timeline**: How do you group projects in the timeline view?
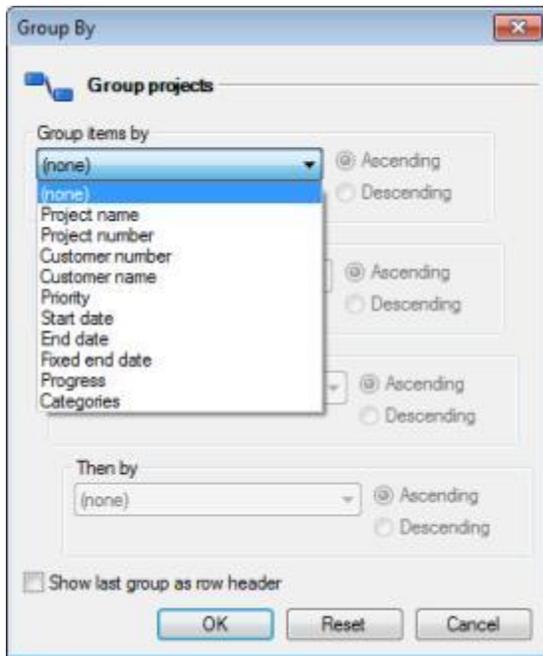
Element	Description
Group items by	Choose a group field: • Start, End, Categories, Progress, Priority, Project number, Project name, Client or Fixed deadline • now, the projects will be grouped by your selected field
ascending / descending	Choose if you want to group ascending or descending
Then by	You could group by four fields
Show last group as row header	This option creates a title column by the last group field.

INLOOX TIME TRACKING LIST

To Outlook 2003/2007 View
Outlook 2010 View

Click on the InLoox Folder in the **InLoox Ribbon Menu**. Change the view from the current view to **time tracking**. Each entry shows information on one time tracking item. The normal display includes all items of projects for which you have permission.

Important **features** of the time tracking list:

- A double-click on **an entry opens** the chosen item
  The dialog **Edit Item** *is displayed - now you can change the data belonging to this item*

-

- By drawing the **name of one column** into the corresponding area the time tracking list is grouped according to this attribute

The menu:

Element	Description
New Entry	Creates a new time tracking item. It will be displayed in the **time tracking list** as well as in the time tracking list of the project in which the time tracking item was created.
Open	Opens the dialog **Edit Item**
Create Reminder	Creates a **reminder** in the **selected item**
Reload	Reloads the **time tracking list**
Print	Prints the **time tracking list**
Edit Filter	The **filter** according to which **the items are shown** can be worked on
Search for	The **overview is searched for appointed criteria** and grouped according to these

To Outlook 2010 View

Outlook 2003/2007 View

Click on the InLoox Folder in the **InLoox Toolbar**. Change the view from the current view to **time tracking**. Each entry shows information on one time tracking item. The normal display includes all items of projects for which you have permission.

Important **features** of the time tracking list:

- A double-click on **an entry opens** the chosen item
  The dialog **Edit Item** *is displayed - now you can change the data belonging to this item*

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New Entry	Creates a new time tracking item. It will be displayed in the **time tracking list** as well as in the time tracking list of the project in which the time tracking item was created.
Open	Opens the dialog **Edit Item**
Create Reminder	Creates a **reminder** in the **selected item**
Reload	Reloads the **time tracking list**
Print	Prints the **time tracking list**
Edit Filter	The **filter** according to which **the items are shown** can be worked on
Search for	The **overview is searched for appointed criteria** and grouped according to these

Personal Views / Workflows

HNITS ON THE USE OF THE PROJECT OVERVIEW

We have gathered some information on the **InLoox Project Overview** for new users of Outlook. The basics described here also apply to all other Outlook folders. They will help you to optimize your personal productivity and keep better track of your project work

Hints:

- You can define new **views**, for example projects with open budgets or projects sorted by state. Do take advantage of this facility. Select a different view from the list **Current view** in the **InLoox Ribbon Menu / Toolbar**. More information on this topic can be found in the chapter on Defining views

- Search through the project list for relevant information that you have input for your projects, no matter whether it be an offer, a contact, a specific amount or a note in the activities. You can also use filters to seek out a specific project or reduce the view to shows only the data you need. More information on this topic can be found in the chapter on Finding Projects

- You can also modify the columns of the project overview. All Outlook sorting, filtering and grouping features can be used in the **InLoox Project Overview**. More information on this topic can be found in the chapter on Hints on the use of personalized views

DETAILED INFORMATION: CONFIGURATION: HINTS ON PERSONALIZED VIEWS

InLoox provides many options for sorting and organizing data. Furnishing your projects with personalized views is particularly easy and quick. These help the flexible display of data.

Hint: How to change a standard view:

- It is possible to add and delete columns in the Project Overview. If a required aspect of the data is missing, simply add the corresponding field:

    1. Click on the column **Number** in the **InLoox Project Overview** with the right-hand mouse button

    2. Click on the menu item **Choose Fields**
       *The dialog box **Choose Fields** is displayed*

    3. Click in a field, e.g. **Customer**, hold the mouse button down and drag the field next to the column **Number**
       Two red arrows are displayed

    4. Add the field to the view by simply letting go the mouse button

Further hints:

- All features provided by Outlook for sorting, grouping and filtering can be used in the InLoox Project Overview. Click for example on a column to sort by it or drag the column into the area above the column headers to set up a grouping

- Create new views and offer them to all users, e.g. **Open costs**, **Projects by Customer** or **Projects by Status**. Instructions can be found in the chapter on Defining Views

- Define individual **filters** for all users, e.g. by **project status**. This is a way to transact simple workflows. Example: The development department staff only sees projects with the status **development**. If the status changes to **Bill**, the project becomes visible to accounting staff; for other persons the project remains hidden. Instructions can be found in the chapter on Finding projects under "**Filter**"

DETAILED INFORMATION: CONFIGURATION: GENERATING PERSONALIZED VIEWS

To Outlook 2003/2007 View

Outlook 2010 View

InLoox provides many options for sorting and organizing data. Furnishing your projects with personalized views is particularly easy and quick. These help the flexible display of data.

Use of a personalized view is as follows:

1. Click **Projects** in the **InLoox Ribbon Menu** or **InLoox Folder** in the **InLoox Toolbar**
   Outlook switches to the InLoox Project Overview

2. Click **More Views**

3. Select a view from the list, e.g. **Project Controlling**

💡 **Hints** on the customizing of views can be found in the chapter on Hints on Personalized Views

The following views are included in **InLoox** as standard:

Name	Appearance/Filter/Grouping	Purpose
Active Projects	Filter; all non-completed projects	To show all active projects, for example to create turnover lists or support customers
Inactive Projects	Filter; all completed projects	To inspect archived project records
Projects by Category	Grouping; all projects grouped by the field **Category**	Helps to maintain overview as projects multiply
Projects by Status	Grouping; all projects grouped by the field **Status**	Displays internal procedure
Projects by Project Manager	Grouping; all projects grouped by the field **Project Manager**	Displays internal responsibilities and allocated projects
Projects by Customer	Grouping; all projects grouped by the field **Customer**	Displays external responsibilities and allocated projects
Negative Gross Result	Filter; all projects in which the total costs are **higher than the invoices rendered**	To identify losses and determine financing requirements
Open Calculations	Filter; all projects with open budgets of type **Calculation**	To determine turnover potential and follow up on offers

InLoox Project

INLOOX PROJECT

A double click on an entry in the **InLoox Project Overview** opens the corresponding **InLoox project**. It is possible to create a new project by double-clicking on an empty field in the Project Overview or by clicking the button **New Project**.

The entire information on an InLoox project is contained in a form consisting of five pages:

1. The **Management** page contains the project header information. This includes project number, name, customer, persons in charge, contact persons, objectives and degree of urgency

2. The **Planning** page provides a chronological overview of the project in the form of activities and milestones. Resources, dates, duration and interdependencies are held in the database. Automatic planning communications and project cost estimation facilities are available

3. The **Mind map** page makes a graphic display of your project possible

4. The **Time tracking** page lists all time tracking entries carried out by project team members (time and effort), events and notes. Thus, this page shows time tracking items **already performed**

5. The **Documents** page supports the straightforward management of all documents concerned with the project. Outlook elements, internet links and information are assigned to the project. Documents can be opened and edited within InLoox

6. The **Budget** page is for the management of expenses and positions. All budgets are assigned a state and can be exported using a simple procedure

7. The Budget overview page maintains an ongoing comparison of planning, expenses (actual, time tracking) and budgets. A cost controlling facility displays all amounts summarized by group and highlights negative positions

Information on the Menu and Ribbon/Toolbar in the InLoox Project can be found here.

Management Page

MANAGEMENT PAGE

The **Management** Page is the principal starting point for anyone involved in the project. This aspect of InLoox can be looked upon as a **portal** through which all significant project data can be looked up and stored away in condensed, structured form.

Information in the **Management** Page:

- **Detailed information** on the page areas Project, Time / State, In charge, Custom and Notes

- **Concise instructions on** how to create a new project and lock or discontinue a project

- Descriptions of the **dialog box** Categories, Customer, Division and of Menus and Toolbars
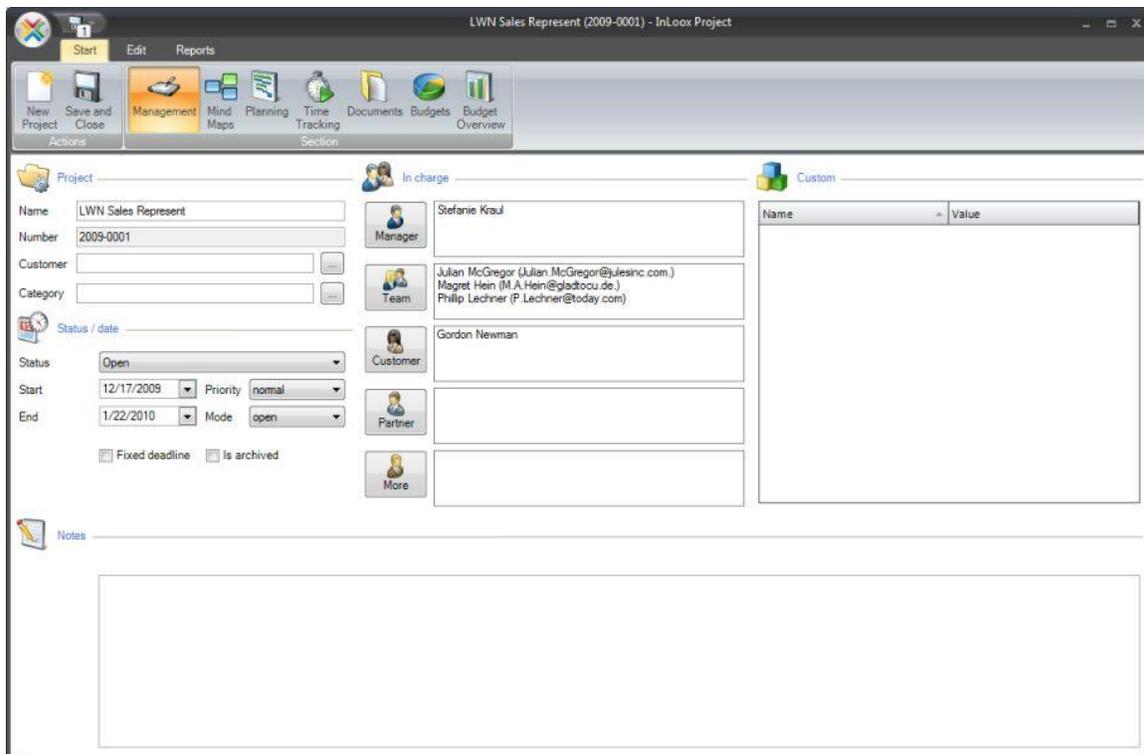
MANAGEMENT PAGE: PROJECT AREA

Detailed information on **Management** Page: elements, features and descriptions.

The **Project** area:

Element	Description
Name	Freely definable short description of the project. The project name can be used more than once.
Number (mandatory)	Unique project number. Once assigned, this number cannot be changed by the user. This field is a **mandatory input**. The format of the project number can be customized under **InLoox Options**
Division... (only InLoox Enterprise Edition)	Choose an internal or external division for the responsibility of your project. The division structure could be defined in the InLoox **Options** dialog
Customer...	Management your customers with involving the dialog Customer or directly by working with the options.Customer. InLoox will display a **selection list** of the customer names already entered for all visible projects.
Categories...	Enter a defining characteristic for the project, e.g. customer initials, internal department name (only available within the enterprise edition!) or business area. The category is freely definable. This field helps the sorting and selection of similar projects from a large project base. Clicking on a button causes the dialog box **Categories** to be displayed

MANAGEMENT PAGE: CATEGORIES DIALOG BOX

Detailed information on the **Management** Page: An existing project is assigned to a category as follows: A category is a keyword or expression that is useful in project administration for searching, finding, filtering or grouping projects.

A brief summary of how to use categories

1. Open a project or create a new one

2. Click on the button **Categories** in the **Project** area of the **Management Page**)
   The dialog box **Category** *is displayed:*
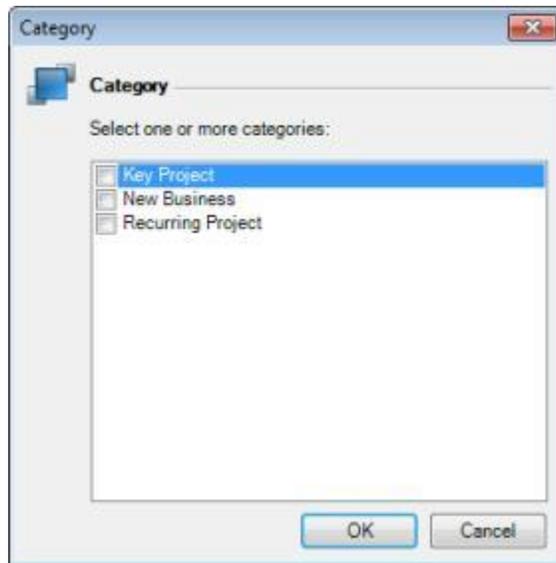
3. Activate the relevant category in the list

4. Click on **OK**

💡 **Hint**

It is possible to add, change or delete categories. Further information can be found in the chapter on Editing Categories

MANAGEMENT PAGE: TIME / STATE AREA

Detailed information on the **Management** Page: elements, features and descriptions.

The **Time / State** area:

Element	Description
State	Specify here the state of development of the project. Possible options are **In progress**, **Completed** or **Discontinued**. The project state options can be customized under **InLoox Options**
Start	Select from the calendar a date for the start of the project. This may also be typed in directly. When a new project is created, today's date is proposed automatically
End	Select from the calendar a date for the anticipated end of the project. This may also be typed in directly. When a new project is created, today's date is proposed automatically. The end date must not be earlier than the start date
Fixed deadline	Specifies whether the end date can be postponed. Typical examples of fixed deadline projects are trade fairs and Christmas card mailings
Archived	Specifies whether the project is archived. Archived projects could only be accessed over the **Archived** InLoox folder
Priority	Specifies the urgency of the project. Possible settings are **low**, **normal** or **high**. The standard proposed setting is **normal**. Projects of low or high priority are flagged in the **Project Overview** with ⬇or ⬆ respectively.
Mode	Select **locked** to shield the project from any changes. The mode can only be changed by authorized users. Permissions can be changed under **InLoox Options** for each user separately or on a role basis If mode is set to **inactive**, project notifications are deactivated. No messages are sent to the project resources
💡 Hint	Use **views** to monitor the state of several projects at once. Further information on this can be found in the chapter on Generating personalized views

MANAGEMENT PAGE: DIVISION DIALOG BOX

Detailed information on the **Management** Page: An existing project is assigned to a client as follows:

A brief summary of how to use divisions

1. Open a project or create a new one

2. Click on the button **Division** in the **Project** area of the **Management Page**)
   *The dialog box **Division Structure** is displayed:*
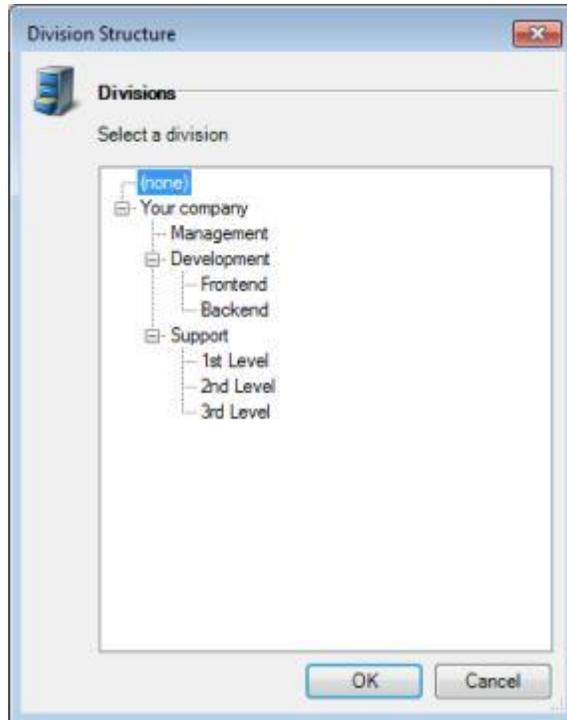
3. Select a division from the list

4. Click on **OK**

💡 **Hint**

It is possible to add, change or delete divisions. Further information can be found in the chapter on Management Divisions

MANAGEMENT PAGE: CLIENT DIALOG BOX

Detailed information on the **Management** Page: An existing project is assigned to a division as follows:

A brief summary of how to use divisions

1. Open a project or create a new one

2. Click on the button Division in the **Project** area of the **Management Page**)
   The dialog box **Division** *is displayed:*
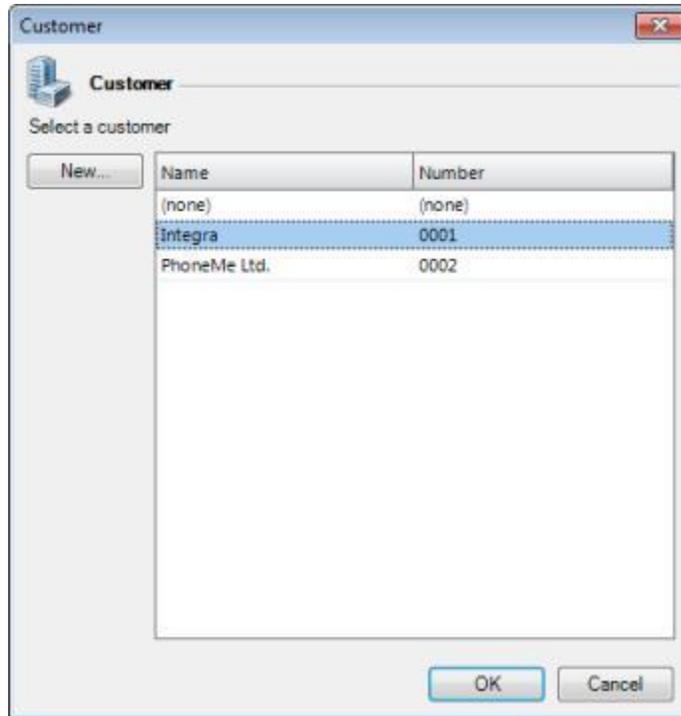
3. Select a division from the tree structure

4. Click on **OK**

💡 **Hint**

It is possible to add, change or delete divisions. Further information can be found in the chapter on Editing Divisions

This feature is only available in InLoox Enterprise Edition

MANAGEMENT PAGE: IN CHARGE AREA

Detailed information on **Management** Page: elements, features and descriptions.

The **In charge** area**:**

Element	Description
Manager...	Click on this button and select from the list one or more **managers** for the project
Team...	Click on this button and select from the list one or more internal **team members** or **employees** for the project
Customer...	Click on this button and select from the list one or more contact persons from the **Sold-to party** or **Customer** for the project
Partner...	Click on this button and select from the list one or more contact persons from **Partners** or **Supplier**, who are currently involved in the project
More...	Click on this button and specify any other contacts, e.g. quality management staff, heads of department or other stakeholders
Important	When using InLoox **Workgroup** or **Enterprise Edition**, persons in charge may have permissions to access the project. This depends on how InLoox has been configured. Further information can be found in the chapter on User-based permissions in the InLoox Option
Hints	The following is also possible: • View a contact by **double-clicking** on the name • Create a new contact by clicking on one of the buttons **Team...**, **Customer...** or **Partner...**. There is also a **select contact** option • Select a mailing list containing for example all members of the customer's **project team**. Mailing lists are **automatically resolved** by InLoox • A click with the right-hand mouse button will open a popup menu to **delete** and **alter the sequence** of contacts

MANAGEMENT PAGE: CUSTOM AREA

Detailed information about the **Management** Page: elements, features and descriptions.

The **Custom** area:

Element	Description
List (Name / Value)	For the input and display of supplementary information, for example **security rating**, **risk factor**, **project code** or **technical abbreviations**.
	New fields can be added via the **Options** dialog.
Hint	Define new fields as soon as possible to allow information to be structured.
	Displays of custom fields within the project and can be sorted, grouped and filtered. Further information can be found in the chapter on Hints on personalized views

MANAGEMENT PAGE: NOTES AREA

Detailed information on the **Management** Page: elements, features and descriptions.

The **Notes** area:

Element	Description
Title	Displays the date of last update and the name of the person carrying this out, identified by Outlook or Windows account name. In new projects the remark "**Not yet created**" is to be seen here.
Input field	Multiple-line free text field for the concise recording and sharing of significant project data. Enter here for example the project objective, the order type or internal remarks.

Mind Maps Page

MIND MAP PAGE

The **Mind Map Page** displays the mind structure and theme structure of a project. As example **descriptions and icons** of the themes can be recorded. Nodes of the Mind Map can be converted into planning elements. Links to files and internet addresses can also be assigned to specific planning elements if needed

Element	Description
New Mind Map	Creates a new node. You can either label it right away or do this by clicking on the right mouse button, then choosing Edit
Edit Mind Map	Changes the selected node. The dialogue box Edit Mind Map Node is displayed.
Delete Mind Map	Removes the selected node from the Mind Map.
Copy To Planning	Opens the dialog "**Copy Mind Map**". All nodes of the selected mind map will be copied to the planning section. Please select a start date and the initial duration of the planning items to be created.
	If you have assigned resources to at least one of the mind map nodes, you can select the type of notification you would like to use, to inform the resource. The workload can be distributed as follows:
	Complete effort: All resources will have a capacity utilization of **100 percent**. **Duration for each resource**: The total workload will be distributed equally to each resource.
New Node	Create a new sub node
Edit Node	Modifies the selected Node. The dialogue box "Edit Mind Map Node" appears: the selected node can be edited
Delete Node	Removes the selected node from the Mind Map

Progress	Set the progress of the selected node to **0**, **25**, **50**, **75** or **100 percent**
Print	Starts the quick print feature of the mind map view
Load Template	Loads a saved Mind Map model
Save Template	Saves the created Mind Map either as model, in the planning page, as a picture or as another format
1:1	Defaults the zoom level
Zoom In / Zoom Out	Changes the zoom level
Resource Overview	The dialogue "**Resource Overview**" appears. Detailed information on the Planning page
Format	Edit the **font**, **fill- und stroke color** of the selected node
Format Child Elements	The selected format is applied to all sub nodes

PLANNING PAGE: DIALOG BOX NEW NODE / EDIT NODE

Detailed information on the **Mind Map**: Described here is the method for modifying an existing node.

The dialog box **Edit Mind Map Node**: Standard tab
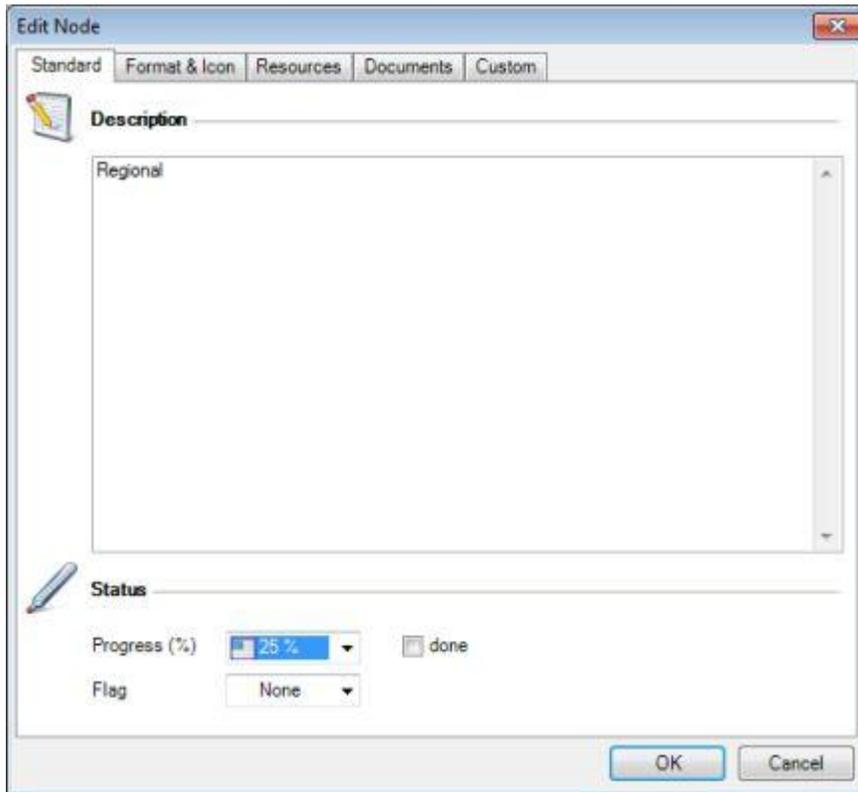
Element	Description
Description	A description for the node
Progress (%)	Grade of accomplishment of the node. Choose between 0, 25, 50, 75, or 100 per centum. Click on Done to set the node up to 100%.
Done	Shows off the node as "done" in planning
Flag	Chose a flag for the node (none, , ,)

The dialog box **Edit Mind Map Node**: Format & Symbol tab
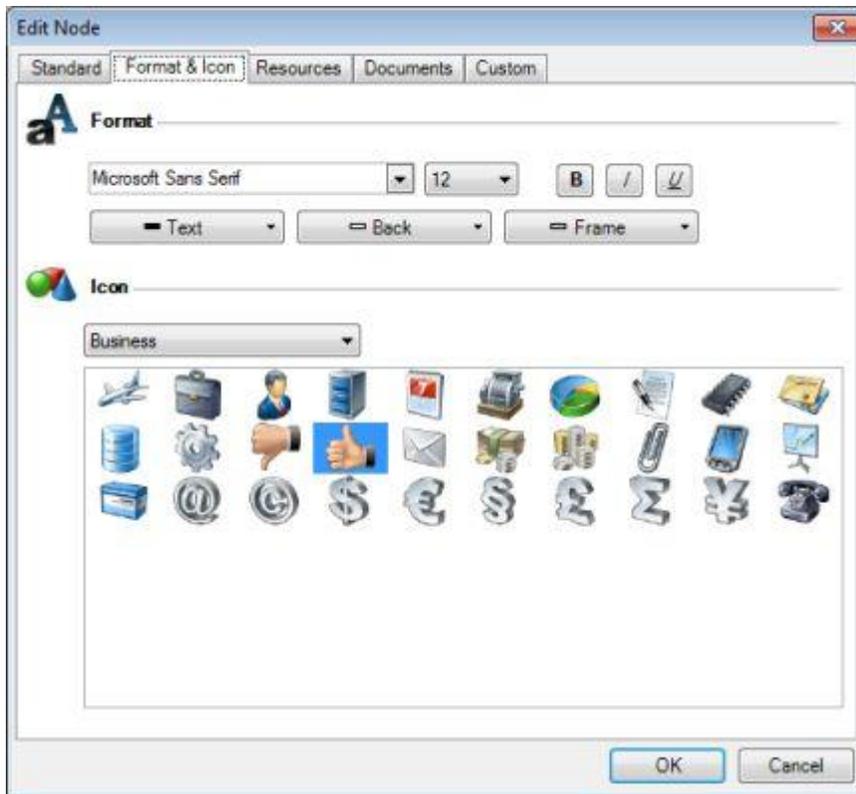
Element	Description
Format	Allows as well the configuration of ***font, font size, color*** as the ***color of the node or the color of the frame of the node***
Symbol	Marks the node with **any symbol.** This symbol will appear within the node. You can choose from symbols in the field of **Basics, Business, and Miscellaneous.**

The dialog box **Edit Mind Map Node:** Resources tab
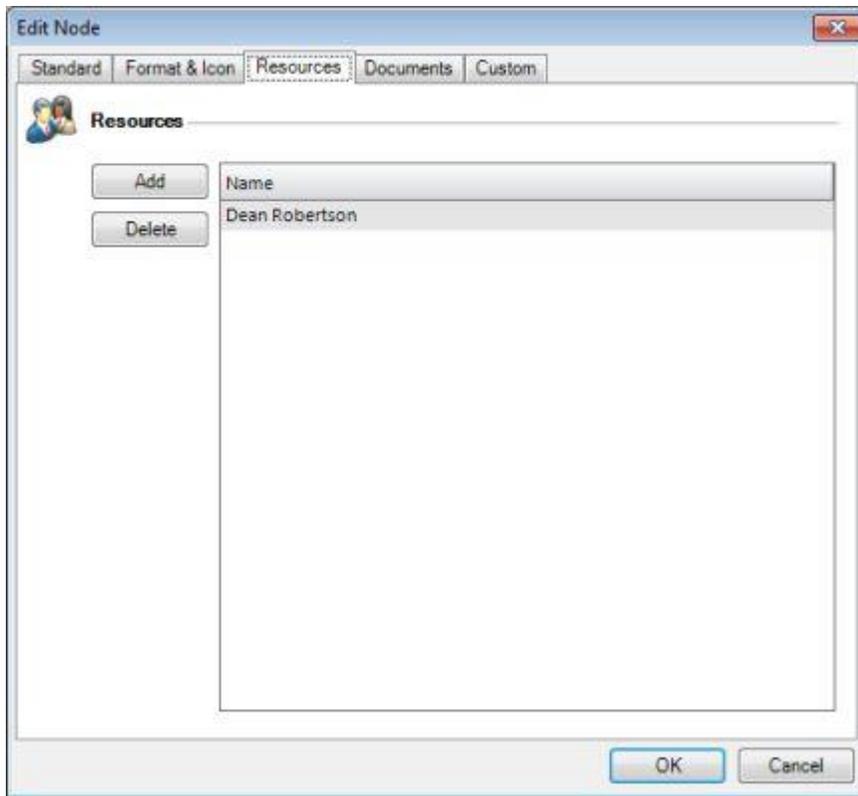
Element	Description
Add	Adds a resource to the node
Delete	Removes the selected resource from the node

The dialog box **Edit Mind Map Node:** Documents tab
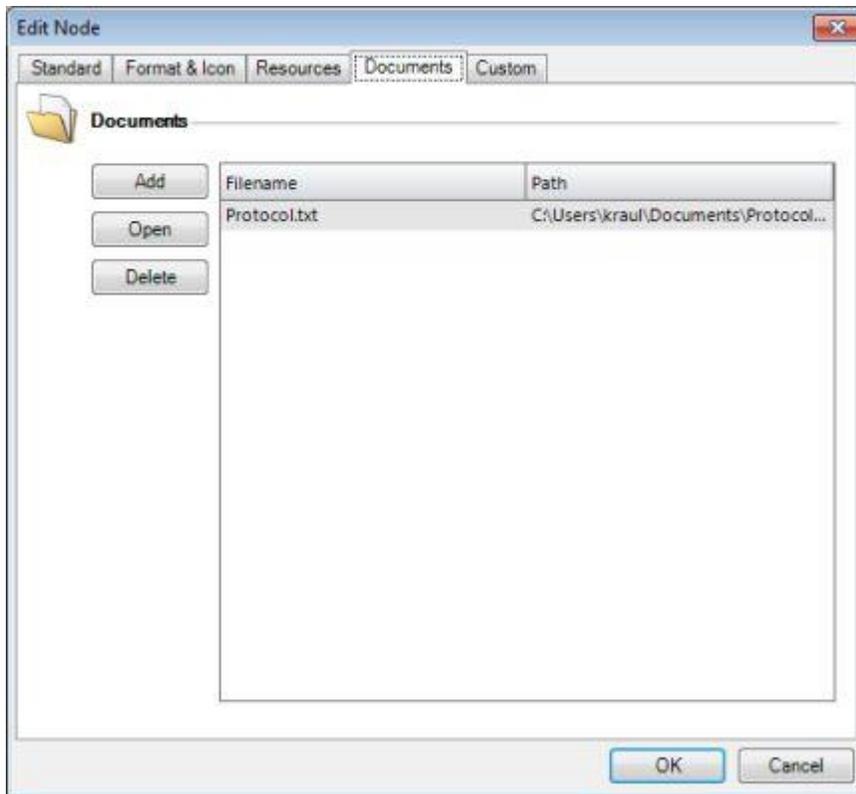
Element	Description
Add	Opens the dialog box **Add Document**
	1. Select the **type** of document: **File link /Internet Link**
	2. Name the **path** of the document or the internet link
	3. Click on **OK**
Open	Opens the selected document
Remove	Removes the selected document

The dialog box **Edit Mind Map Node**: Custom tab
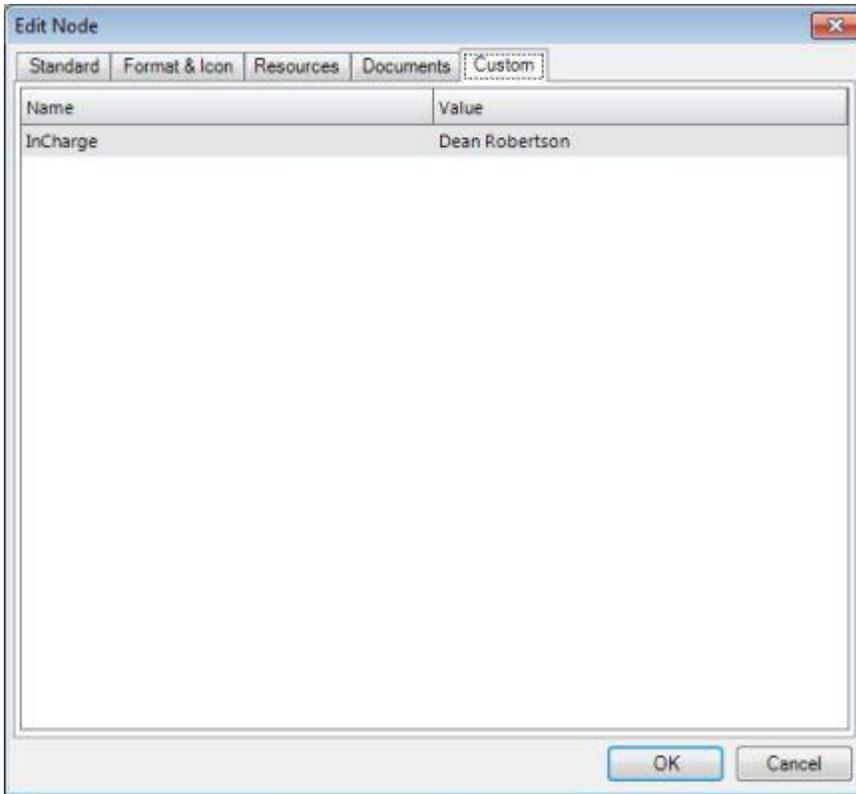
MINDMAPS PAGE: DIALOG BOX SAVE TEMPLATE

Detailed information on the **Mind Map Page**: Described here is the method for saving a mind map to a new template

A brief summary of saving a template

1. Open a project

2. Select page "**Mind maps"**

3. Click on the button **Save Template >> InLoox...**
   The dialog box **Save Template** *is displayed:*

4. Enter a **Name**

5. Click on **OK**

💡 **Notes**

Templates of the following **Other formats** can also be saved: **Extensible Markup** (XML). Use the menu item **Save Template >> Other format...**

Planning Page

PLANNING PAGE

The **Planning Page** displays the activities, milestones and resources of a project. As example **descriptions** of the work steps can be recorded. Everyone who is involved in the project is kept automatically informed about the planning elements by InLoox or via Outlook. Links to files and internet addresses can also be assigned to specific planning elements if needed

Information on the **Planning** Page:

- **Details** of the areas of the page: Planning

- **Concise instructions** are available: Create planning, Display and process work packages, Create Summary Activity

- Descriptions of the **dialog boxes**: New Activity / Edit Activity, New Milestone / Edit Milestone, New Summary Activity / Edit Summary Activity, Load Template, Save template, Resource Overview, Print
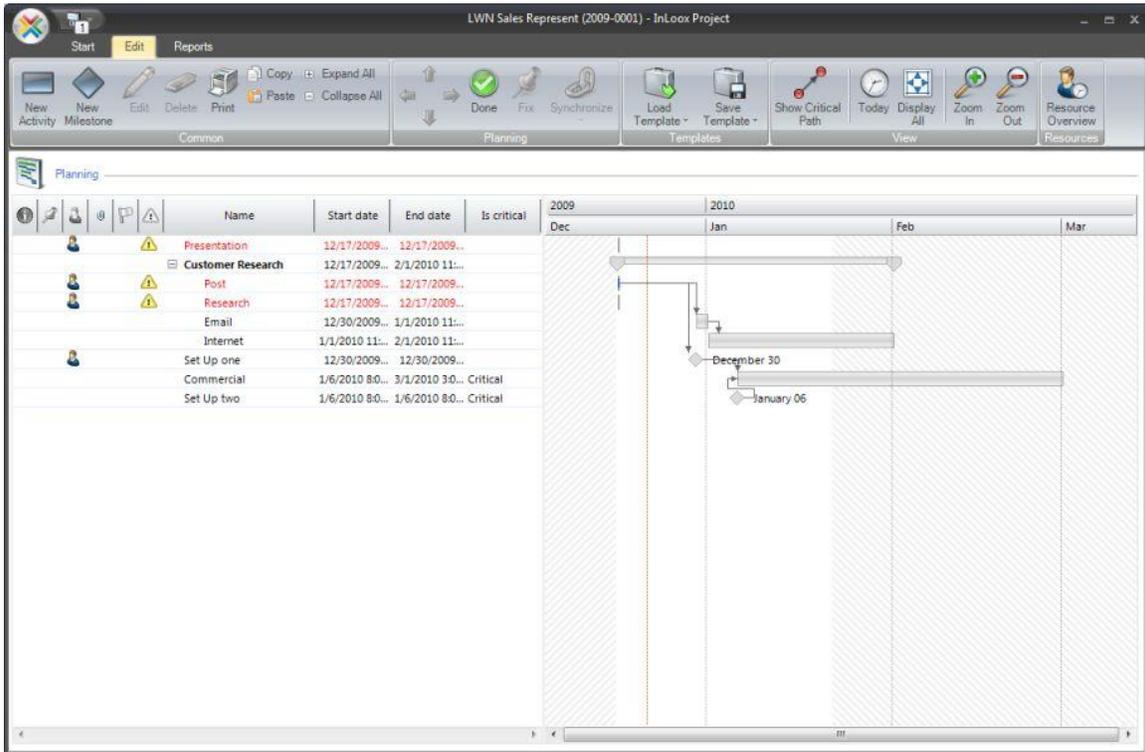
PLANNING PAGE: ACTIVITIES & MILESTONES

Detailed information on the **Planning** Page: elements, features and descriptions.

The **Planning** Area:

Element	Description
New Activity	Creates a new activity in the Gantt chart. A click on this button causes the dialog box **New Activity** to be displayed. The element is inserted behind the currently selected element
New Milestone	Creates a new milestone in the Gantt chart. A click on this button causes the dialog box **New Milestone** to be displayed. The element is inserted behind the currently selected element
Edit	Changes the selected element in the Gantt chart. A click on this button causes the dialog box **Edit Milestone**, **Edit Activity**, or **Edit Summary Activity** to be displayed, according to type
Delete	Removes the selected element from the Gantt chart
Print	Prints the Gantt chart. Clicking on this button causes the dialog box **Print** to be displayed
Up/Down (/)	Moves the selected element up or down the list
Group (/)	groups the selected element one level deeper moves the selected element one group level higher More information can be found in the chapter on Creating Groupings
Done	Sets the selected activity to "Done". If the activity has already expired, the alert ( ) is removed
Fix	The current selected elements (activities or milestones) will become fixed in the plan and cannot be moved anymore.
Reports	Creates a report about the contents of the planning. The report template can be customized. Permission is required. Details can be found under Customizing Report Templates
Synchronize	Select **With Outlook Task** to create a new Outlook task ( ) in your personal task list. The command **With Outlook Calendar** creates a new appointment in your personal calendar ( ). The data from the selected element (activity, milestone or summary activity) are transferred automatically
Load Template	Loads a planning template into the current plan
Save Template	**Saves** the current plan as planning template
Critical Path	Shows or hides the critical path of the project. If the critical path is shown, the critical elements and dependencies are displays in **red**. Existing color accentuations are hidden.
Today	Switches to today. The plan is positioned so that the **red** day line is on the left side of the Gantt chart.
Display all	Adjusts the date interval of the Gantt chart to the project end or start - first and last element. (**Management** Page)
Zoom (/)	Changes the Gantt chart view. Possible values:

- Years

- Quarters

- Months

- Weeks

- Days

- Hours

- Quarter-hours

- Minutes

Resource Overview	Opens the Resource Overview for the project

Gantt chart	

- 💡 Use the mouse to adjust the position and duration of the elements. Hold down the Ctrl key and drag the predecessor/successor relationship between activities and milestones.

- 💡 Use the shift key when moving or enlarging elements to prevent the successor and predecessor from being influenced

- 💡 Zoom by holding down the **Ctrl** and scrolling with the mouse wheel

- The present time, or day line, is represented by a vertical red line

- One click centers the selected element in the Gantt chart

- A **double-click** edits the selected element

- A blue bar shows the **progress** of an activity in percent (%)

- 📎 A paper clip is displayed beside elements to which documents are linked

- A click on the **minus sign** (⊟) besides a summary activity hides all elements belonging to it. The **plus sign** (⊞) causes them to be displayed. See also the commands **Expand all groups** and **Collapse all groups**

- A **context menu** is displayed by clicking with the right-hand mouse button in the Gantt chart. The commands **New Activity**, **New Milestone**, **Edit**, **Delete**, **Fix**, **Show Critical Path, Copy, Paste, Expand all groups**, **Collapse all groups**, **Choose fields**

- A **context menu** is displayed on clicking with the right-hand mouse button in the header area of the Gantt chart. It allows the customization of the view (**Choose fields**) and the hiding and displaying of specific columns

- If you have no read permission, no planning elements will be displayed

The following symbols are displayed beside the **planning elements**:

- ✔ A check mark shows that the element is **completed**

- ⚠ An alert shows that an element **is already overdue** but has not yet been **completed**

- 🚩🚩🚩 A flag is used to highlight specific elements

- 📍 A Pin shows that the element is **fixed** (i.e. has a fixed deadline) and **cannot be moved** on the timeline

- The symbol resource shows that resources have been assigned to the element

- The symbol resources have completed their work shows that all resources of the element have completed their tasks successfully

- A paper clip shows elements to which documents are linked

The following short cut keys are available in the **Gantt chart**:

- Ctrl + P: New Activity

- Ctrl + M: New Milestone

- Ctrl + A: Select all elements

- Ctrl + Arrow to right: move selected elements to right (same as)

- Ctrl + Arrow to left: move selected elements to left (same as)

- Ctrl + Arrow upwards: move selected elements upwards (same as)

- Ctrl + Arrow downwards: move selected element downwards (same as)

PLANNING PAGE: DIALOG BOX NEW ACTIVITY / EDIT ACTIVITY

Detailed information on the **Planning** Page: Described here is the method for creating a new activity or modifying an existing one.

An activity is a planning step within a time period. It is possible to add resources and successors to an activity. Automatic **notifications** can be added to keep team members, partners and customers informed. Links to **Documents**, files and internet addresses can also be added to an activity.

Concise instructions for creating a plan are available

The dialog box **New Activity / Edit Activity**: Standard tab
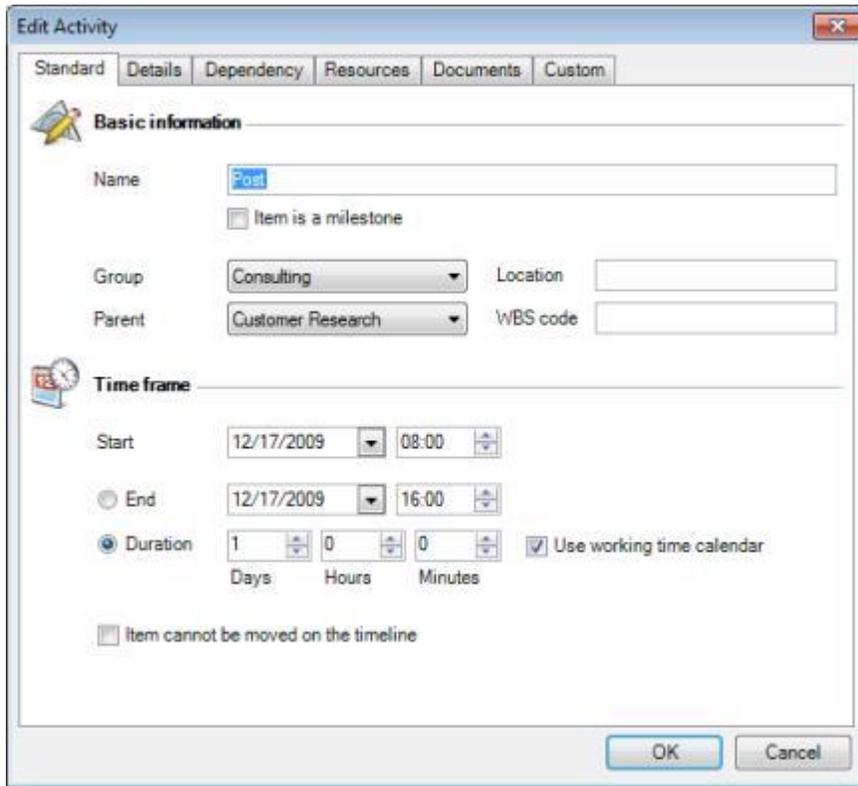
Element	Description
Name (*)	A description for the activity, e.g. **Development** or **Design**
Element is a milestone	Indicates the type of element (**Activity** or **Milestone**). In this case the flag is not set
Group (*)	Group to which the activity belongs. The **Group** can be a sort criterion or a project cost center
	An internal price per hour is on file for each **Group**. The internal prices per hour and the available groups can be customized under **InLoox Options**

Parent	Summary Activity to which the activity belongs
Location	Free text field, in this case, where the activity of the activity is to take place
WBS code	WBS code = Work Breakdown Structure code. Free text field for identifying activities and milestones in large projects
Begin (*)	Date and time of the planned start of the activity. When adding a new activity the date of the above element or the project start date and the **Starting Working Time** for the corresponding day of the week are proposed automatically and can be changed
End (*)	Date and time of the planned end of the activity. When adding a new activity the end of the above element and the **Finishing Working Time** for the corresponding day of the week are proposed automatically and can be changed
Duration	Length of the activity. Specify the following:

- Days / Hours / Minutes

Use working time calendar	Specifies whether the **duration** given is **working time** (as set down under Working Time Options).

Sample:

An activity begins on a Friday; the next working day is a Monday. The activity has a duration of one day. If **Use working time calendar** is activated, the activity ends on Mondays, if not, on Saturdays

Attention:

This feature is only to ease the time input. The behavior of the element is not changed on any way.

Element cannot be moved on the timeline	Prevents the activity from being moved. If predecessors or successors are moved, the activity does not move but the available buffer time is used up
Note	(*) These fields are mandatory inputs when adding or modifying activities

The dialog box **New Activity / Edit Activity**: Details tab

Element	Description
Description	Multiple-line free text field for activities and instructions concerning the activity. Enter the required work results or internal remarks
Progress	Degree of completion of the activities in percent (number between **0** and **100**). Click on **done** to set progress to **100%**
Flag	Select a flag for the activity (none, 🚩 , 🚩 , 🚩). The activity will be color-highlighted accordingly in the Gantt chart on the Planning Page

The dialog box **New Activity / Edit Activity**: Linking tab

Element	Description
Successors (available)	Select a **milestone** or **activity** from this list and click on the button "**>>**". InLoox creates the chronological interdependency between the activity and the selected successor
Successors (selected)	The list contains all successors of the activity currently being edited. To remove a successor click on the button "**<<**". InLoox deletes the chronological interdependency between the activity and the selected successor
Note	InLoox checks the interdependencies and notifies any need to move the start or end of an element

The dialog box **New Activity / Edit Activity**: Resources tab

Element	Description
Add	Opens the dialog box **New Resource**
	1. Click on the button "..." **to select a contact**. Select on or more contacts from the list and click on **OK**
	2. Select the type of **Notification**. The **notification** determines when and how a contact or resource is to be informed. Select one of: (**none**), **InLoox, Email**, **Outlook task request**, **Outlook appointment request**
	3. Change the **work done** of the resource (optional). The **workload** of the resource in percent in the specified time period is displayed. The **work done** determines the planned time and costs in the Overview Area (column 2: planned costs resources) on the **Budget** Page
	4. Select an individual price per hour according to resource, if you want to ignore the group rate costs
	5. The state shows whether the resource concerned has completed his/her **tasks** for this activity
Edit	Changes the data of the selected **resource**
Remove	Removes the selected **resource** from the list
Workload	Opens the dialog box **Resource Overview**

Hint: More information on automatic **notification** can be found in the chapter on Message Types

The dialog box **New Activity / Edit Activity**: Documents tab

Element	Description
Add	Opens the dialog box **Add Document** Select a document **Type** (file or internet link), enter a **Path** and click on **OK**
Open	Calls up the link or opens the file
Remove	Deletes the selected **link** from the list
List of documents	💡 **Hint**: • A **double-click** calls up the link or opens the file • It is possible to link **files** on your local computer or on a server with the InLoox project plan. If you are a member of a team, specify the **server path** for the link to which all project team members have access

The dialog box **New Activity / Edit Activity**: Custom tab

Element	Description
Custom fields	For inputting and displaying supplementary data such as **billing information**, **technical abbreviations**, **work location**, etc. New fields can be added using the dialog box **Edit Custom Fields**

PLANNING PAGE: DIALOG BOX NEW MILESTONE / EDIT MILESTONE

Detailed information on the **Planning** Page: Described here is the method for creating a new milestone or modifying an existing one.

A milestone is a time of completion. It is possible to add resources and successors to a milestone. Automatic notifications can be added to keep team members, partners and customers informed. Links to **Documents**, files and internet addresses can also be added to a milestone.

Concise instructions for creating a plan are available

The dialog box **New Milestone / Edit Milestone**: Standard tab

Element	Description
Name (*)	A description for the milestone, e.g. **Conclusion** or **Release**
Element is a milestone	Indicates the type of element (**Activity** or **Milestone**). In this case the flag is set
Group (*)	Group to which the milestone belongs. The **Group** can be a sort criterion or a project cost center
Parent	Summary Activity to which the milestone belongs
Location	Free text field, in this case, where the activity of the milestone is to take place

WBS code	PSP code = Work Breakdown Structure code. Free text field for identifying activities and milestones in large projects
Date / Time	Day and time when the milestone is to be achieved. When adding a new milestone the date and time of the previous element or the project start are proposed and can be changed
Element cannot be moved on the timeline	Prevents the milestone from being moved.
Note	(*) These fields are **mandatory inputs** when adding or modifying milestones

The dialog box **New Milestone / Edit Milestone**: Details tab
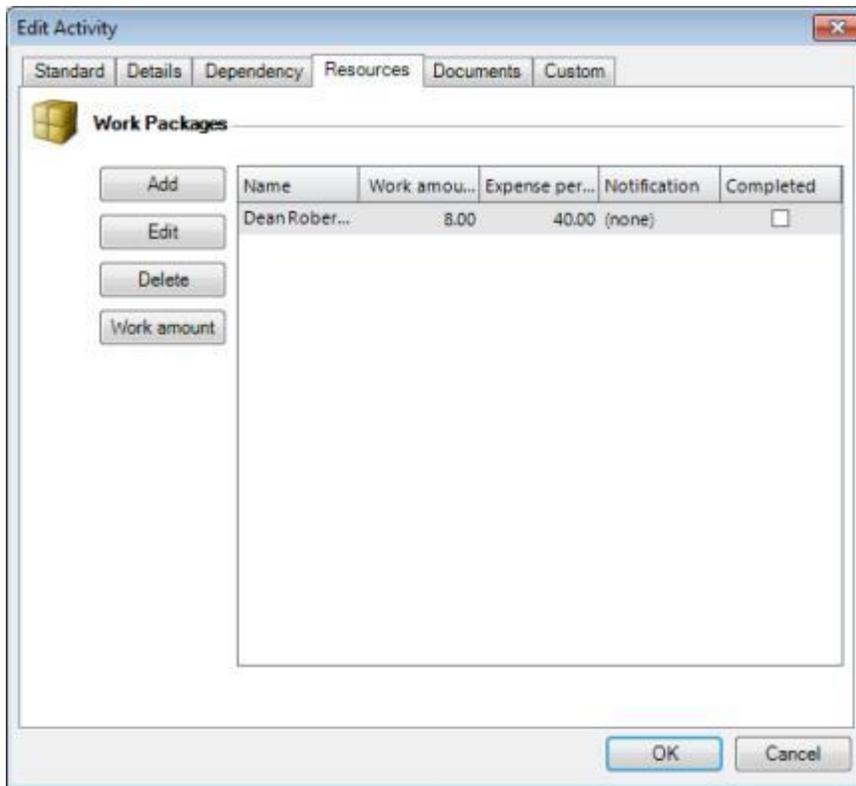

Element	Description
Description	Multiple-line free text field for activities and instructions concerning the milestone. Input here the required work results or internal remarks
Progress	Click on **done** to set progress to **100%**
Flag	Select a flag for the grouping (none, , ,). The activities will be color-highlighted accordingly in the Gantt chart on the Planning Page

The dialog box **New Milestone / Edit Milestone**: Linking tab

Element	Description
Successors (available)	Select a **milestone** or **activity** from this list and click on the button "**>>**". InLoox creates the chronological interdependency between the milestone and the selected successor
Successors (selected)	The list contains all successors of the milestone currently being edited. To remove a successor click on the button "**<<**". InLoox deletes the chronological interdependency between the milestone and the selected successor
Note	InLoox checks the interdependencies and notifies any need to move the start or end of an element. Elements which should become a successor have to be after the current element regarding their time.

The dialog box **New Milestone / Edit Milestone**: Resources tab

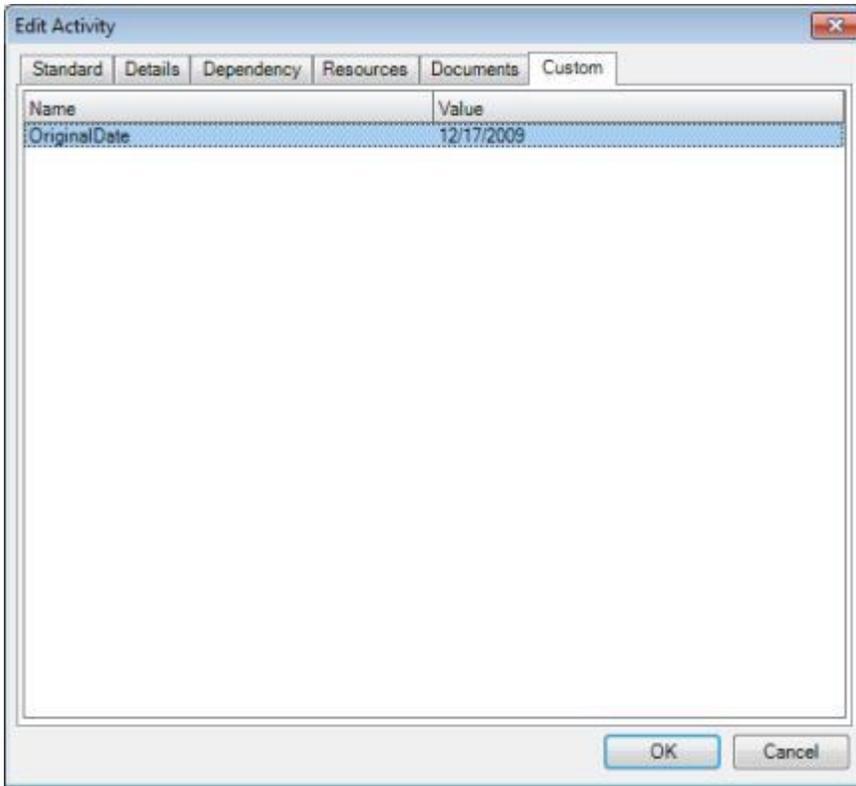| Element	Description
Add	Opens the dialog box **New Resource**
	1. Click on the button "..." **to select a contact**. Select on or more contacts from the list and click on **OK**
	2. Select the type of **Notification**. The **notification** determines when and how a contact or resource is to be informed. Select one of: (**none**), **Email**, **Task request**, **Appointment request**, **InLoox Task**
	3. The **State** shows whether the resource concerned has already completed his/her **tasks** for this grouping
Edit	Changes the data of the selected **resource**
Remove	Removes the selected **resource** from the list
Workload	Opens the dialog box **Resource Overview**

💡 **Hint**: More information on automatic **notification** can be found in the chapter on Message Types

The dialog box **New Milestone / Edit Milestone**: Documents tab

Element	Description
Add	Opens the dialog box **Add Document**. Select a document **Type** (file or internet link), enter a **Path** and click on **OK**
Open	Calls up the link or opens the file
Remove	Deletes the selected **link** from the list
List of documents	💡 **Hint**: • A **double-click** calls up the link or opens the file • It is possible to link **files** on your local computer or on a server with the InLoox project plan. If you are a member of a team, specify the **server path** for the link to which all project team members have access

The dialog box **New Milestone / Edit Milestone**: Custom tab

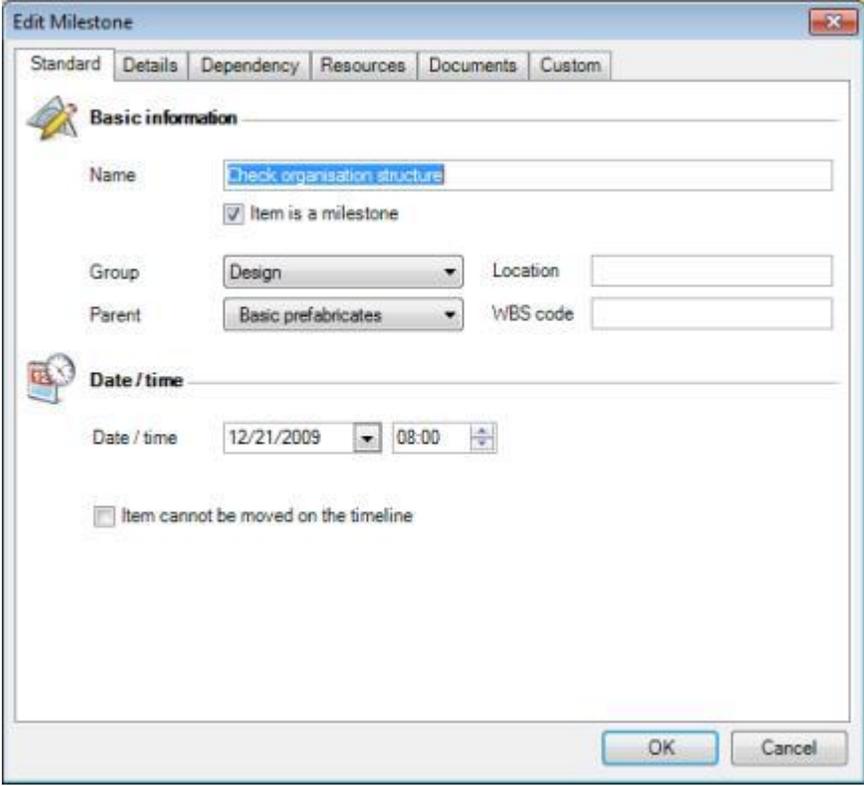| Element	Description
Custom fields	For inputting and displaying supplementary data such as **billing information**, **technical abbreviations**, **work location**, etc. New fields can be added using the dialog box **Edit Custom Fields**

PLANNING PAGE: CREATE SUMMARY ACTIVITY

Detailed information on the **Planning** Page: Described here is the method for creating groupings and structuring planning elements

Concise instructions for creating a grouping

1. Open a project or create a new one

2. Create two activities one above the other, as shown:
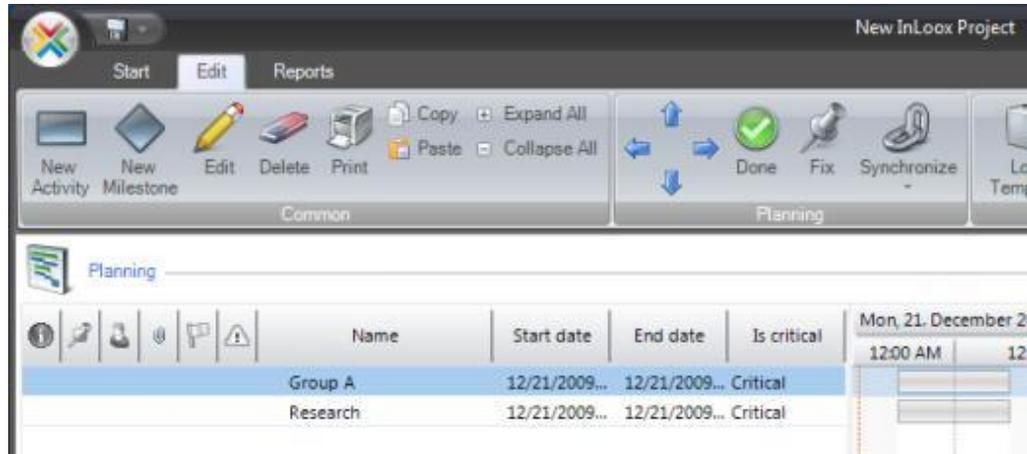
3. **Flag** the lower one and click on the button **Group** (➡)
   InLoox changes the upper activity to a grouping:
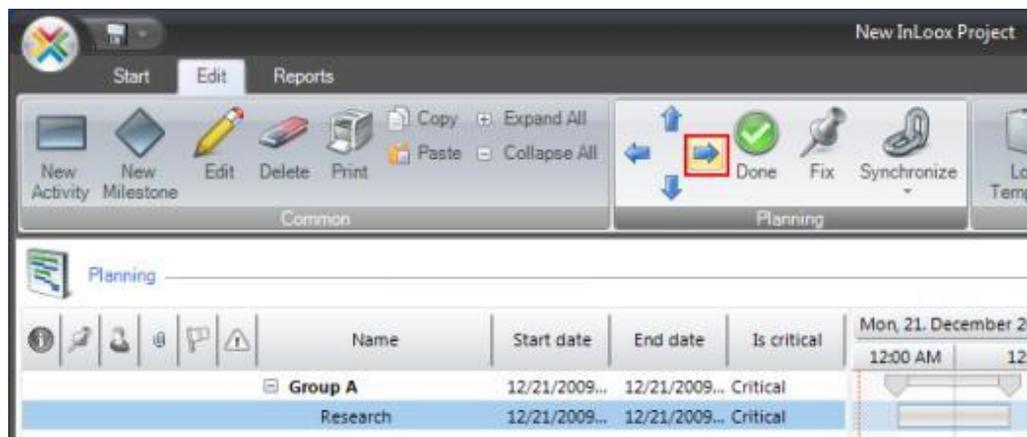
💡 **Notes**

The activity which is to be changed to a grouping must not contain any **links** or **dependencies**
The **time period** for the grouping is automatically adjusted to take account of elements at lower levels

PLANNING PAGE: DIALOG BOX NEW SUMMARY ACTIVITY / EDIT SUMMARY ACTIVITY

Detailed information on the Planning Page: Described here is the method for creating a new summary activity and modifying an existing one.

A summary activity defines the structure of the project planning. There is the option of adding **Resources** to a summary activity e.g. to inform team members, partners and customers. **Links** to **Documents**, files and internet addresses can also be attached to a grouping.

Concise instructions for creating a summary activity are available

The dialog box **New Summary Activity / Edit Summary Activity**: Standard tab
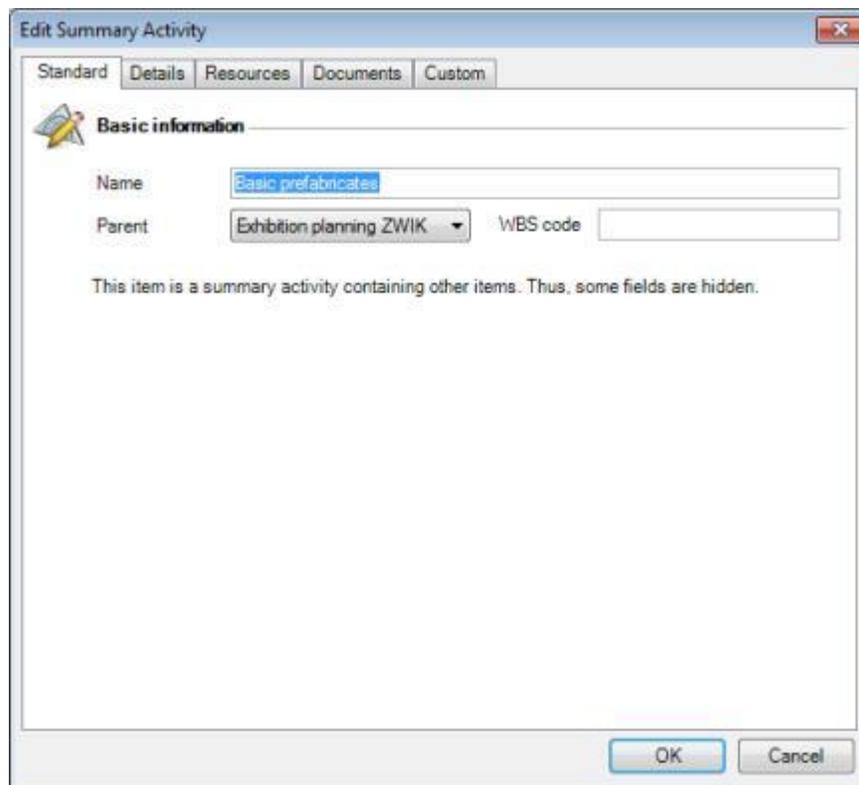
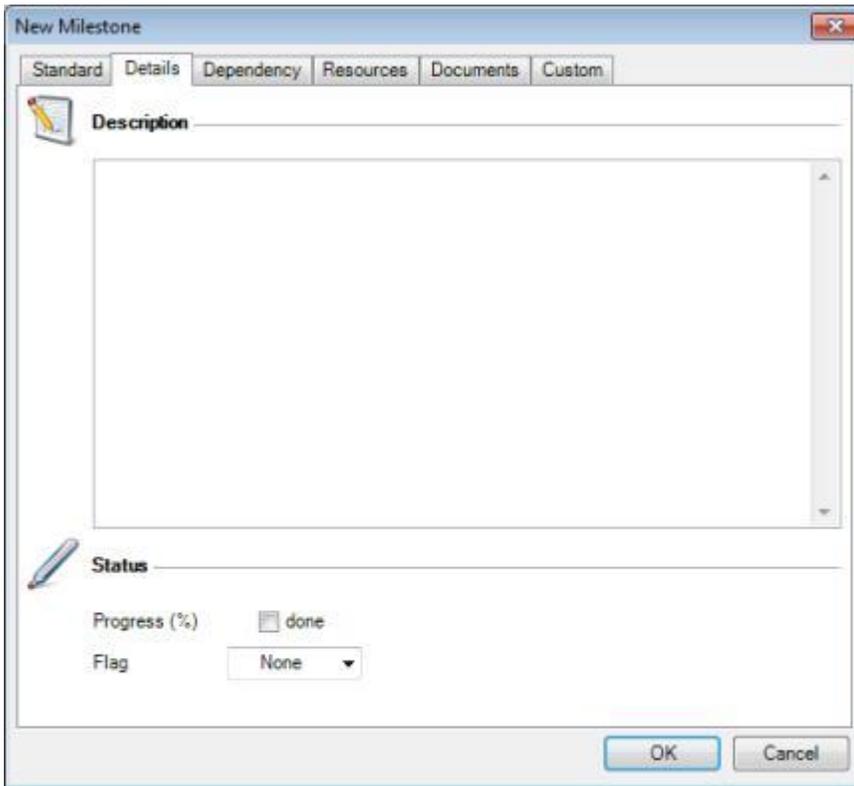| Element	Description
Name (*)	Description of the grouping, for example **Conceptual design**
Grouping	Existing grouping to which the current grouping belongs. InLoox supports hierarchies of any depth
WBS code	WBS code = Work Breakdown Structure code. Free text field for identifying activities and milestones in large projects.
Note	(*) This field is a mandatory input when creating or modifying groupings

The dialog box **New Summary Activity / Edit Summary Activity**: Details tab
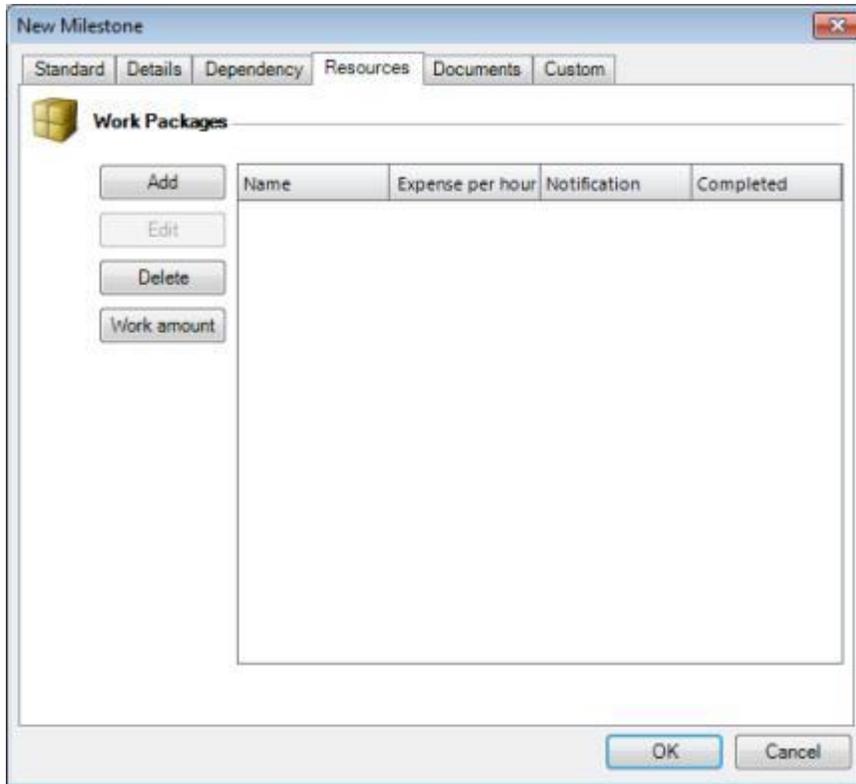

Element	Description
Description	Multiple-line free text field for activities and instructions concerning the grouping. Input here the required work results or internal remarks
Progress	Degree of completion of the grouping in percent (number between 0 and 100).
Flag	Select a flag for the grouping (none, 🚩, 🚩, 🚩). The summary activity will be color-highlighted accordingly in the **Gantt chart** on the Planning Page

The dialog box **New Summary Activity / Edit Summary Activity**: Resources tab
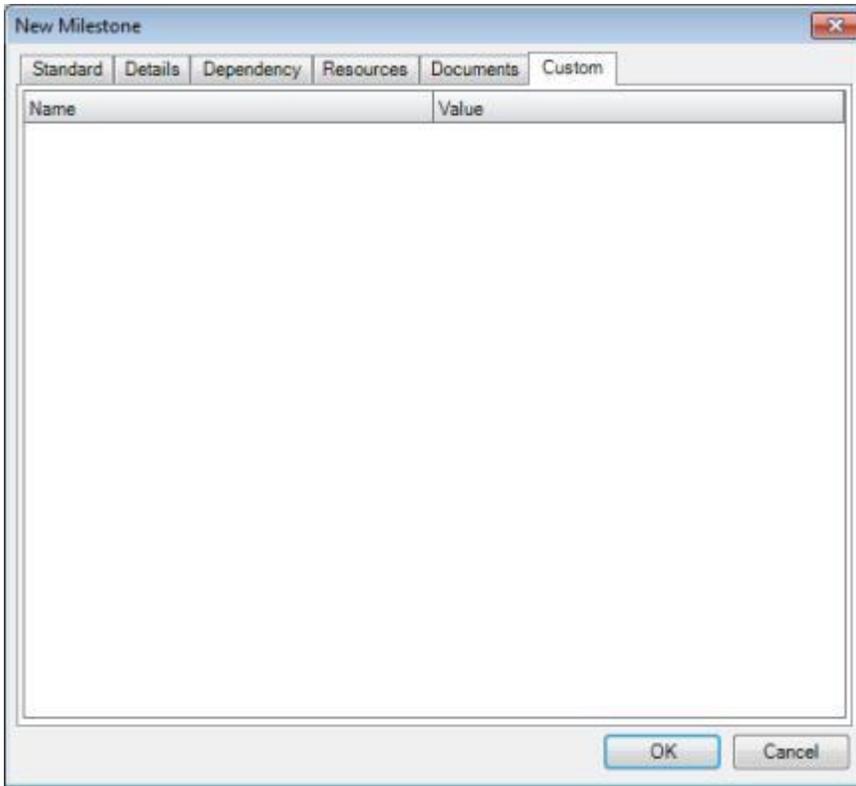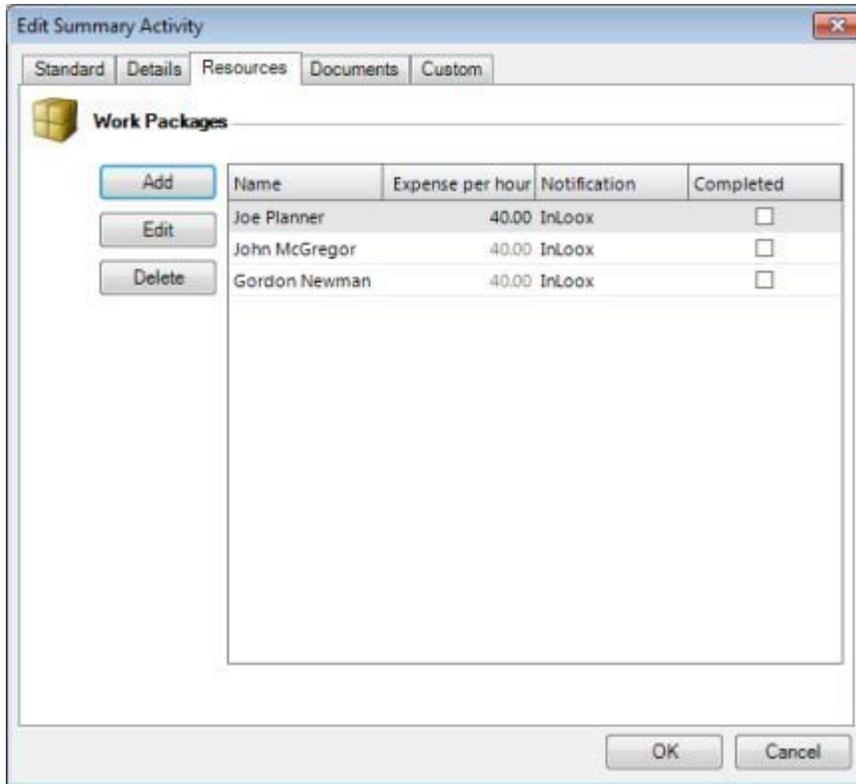
Element	Description
Add	Opens the dialog box **New Resource**
	1. Click on the button "**...**" to **select a contact**. Select on or more contacts from the list and click on **OK**
	2. Select the type of **Notification**. The **notification** determines when and how a contact or resource is to be informed. Select one of: **(none)**, **InLoox**, **Outlook task request**, **Outlook appointment request**
	3. The **State** shows whether the resource concerned has already completed his/her **tasks** for this grouping
Edit	Changes the data of the selected **resource**
Remove	Removes the selected **resource** from the list
Costs	Set costs the single resources are costing

Hint: More information on automatic **notification** can be found in the chapter on Message Types

The dialog box **New Summary Activity / Edit Summary Activity**: Documents tab

Element	Description
Add	Opens the dialog box Add Document.

Select a document **Type** (file or internet link), enter a **Path** and click on **OK**

Open	Calls up the link or opens the file
Remove	Deletes the selected **link** from the list
List of documents	**Hint**:

- A **double-click** calls up the link or opens the file

- It is possible to link **files** on your local computer or on a server with the InLoox project plan. If you are a member of a team, specify the **server path** for the link to which all project team members have access

The dialog box **New Summary Activity / Edit Summary Activity**: Custom tab


Element	Description
Custom fields	For inputting and displaying supplementary data such as **billing information**, **technical abbreviations**, **work location**, etc. New fields can be added using the dialog box **Edit Custom Fields**

PLANNING PAGE: DIALOG PRINT

Detailed information on the Planning Page: Described here is the method for printing a Gantt chart with **Milestones**, **Activity** and **Summary Activity**.

Concise instructions for printing the Gantt chart

1. Open a project

2. Click on the button **Print** in the Planning section (**Planning** Page)
    The dialog box **Print** *is displayed*

3. Select a **printer** and set the **print parameters**

4. Click on **Print**
    The dialog box **Page Setup** *is displayed:*
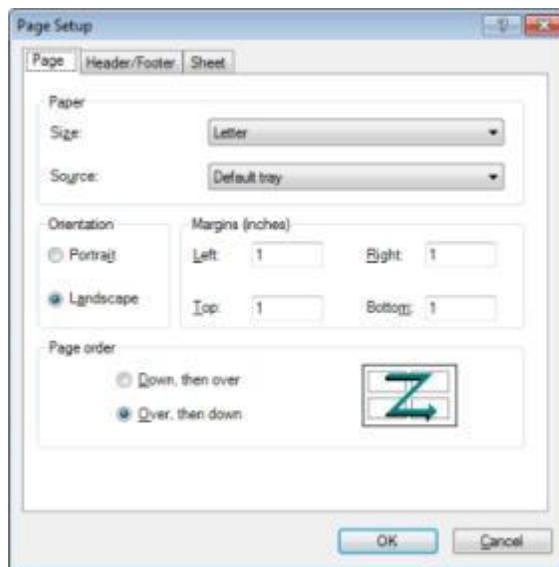
5. Select the orientation and page order under the **Page** tab

6. Select the header and footer lines under the **Header/Footer** tab

7. Select the print range, timeframe and scale (Fit to:) under the **Sheet** tab

8. Click on **OK**

PLANNING PAGE: DIALOG BOX SAVE TEMPLATE

Detailed information on the **Planning** Page: Described here is the method for saving the planning of a project to a new template

A brief summary of saving a template

1. Open a project

2. Click on the button **Save template** >> **InLoox...** in the Planning area on the **Planning** Page
   *The dialog box **Save Template** is displayed:*
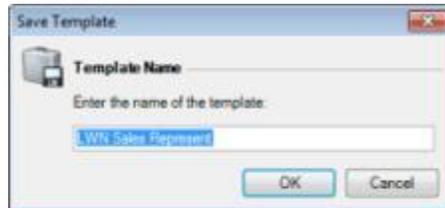
3. Enter a **Name**

4. Click on **OK**

💡 **Notes**

Templates of the following **Other formats** can also be saved: **Microsoft Project** (MPP), **Microsoft Project Exchange** (MPX). Use the menu item **Save template** >> **Other format...**

All Activities, **Milestones** and **Summary Activities** of the current project are saved. InLoox also saves all **resources** with their **notification options**

To modify a template, load it to an empty project. Carry out the required changes and save the template anew. Planning templates can be deleted or renamed under the **InLoox Toolbar** (**Options** - Planning - Templates)

PLANNING PAGE: DIALOG BOX LOAD TEMPLATE

Detailed information on the **Planning** Page: Described here is the method for loading a planning template with milestones, activities and summary activities to a project

A brief summary of loading a template

1. Open a project or create a new one

2. Click on the button **Load template** >> **InLoox...** in the Planning area on the **Planning** Page
    *The dialog box **Load Template** is displayed:*

3. Select a **Template**

4. Select a **Start date**

5. Specify whether the **resource data** of the template should be loaded
    More information on resource data can be found in the chapter on Dialog box **Edit Activity**

6. Specify whether **completion data** should be removed from the **template**
    In this case no progress information from the planning elements and resources are loaded from the template

7. Click on **OK**

Notes

The start date determines at what point in time the first (earliest) activity or milestone from the selected template is to be set. All other elements are scheduled by InLoox based on this point in time

It is possible to load more than one template to a given project. It is also possible to load more than one copy of a template to a project (also known as template duplication)

Templates of the following **Other formats** can also be loaded: **Microsoft Project** (MPP), **Microsoft Project** XML (XML), **Microsoft Project Exchange** (MPX) . Use the menu item **Load template** >> **Other format...**

PLANNING PAGE: Critical Path

You can see the critical path of a project under **project -> planning**.

A critical path does only exist if there is a **dependency between the activities of a project**, i.e. task B follows task A. The critical path is defined by a **clear progression of activities without any chronological buffer**, i.e. time between task A and task B accounts zero.

Shifting of one activity results in shifting the endpoint of the whole critical path. According to this **extension of an activity** means **extension of the critical path** and thus the transgression of the endpoint of the project.

The critical path is colored **red** by InLoox.
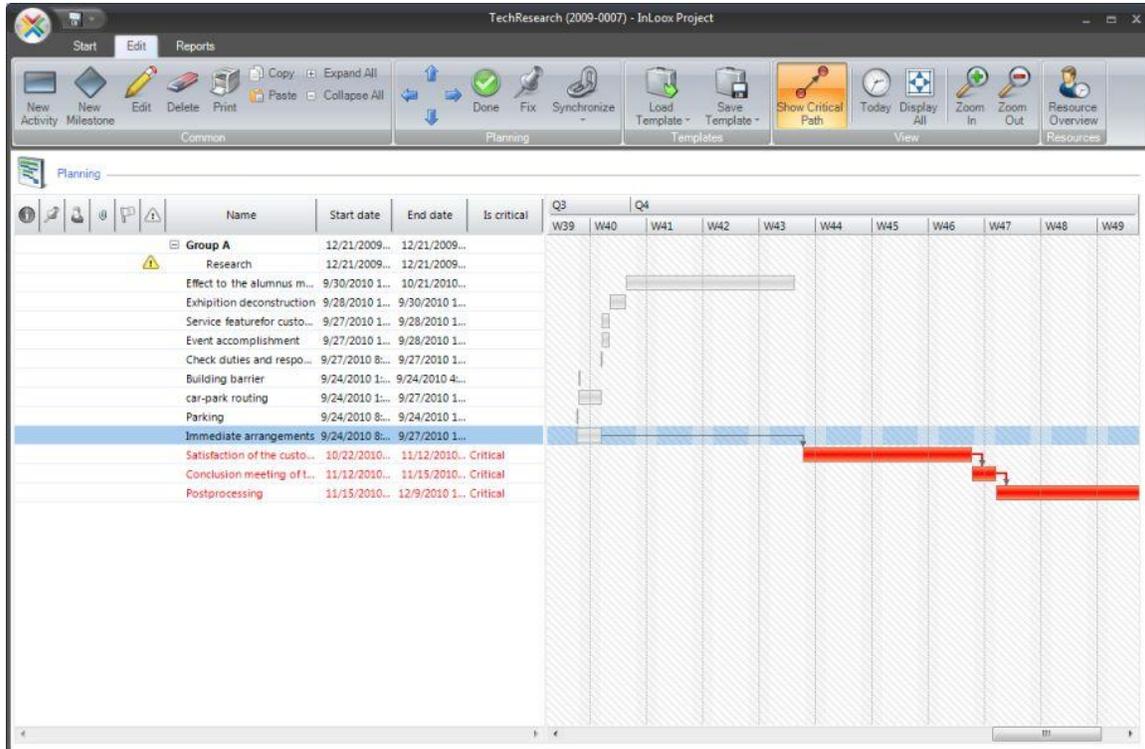
PLANNING PAGE: DIALOG BOX RESOURCE OVERVIEW

Detailed information on the **Planning** Page: The **Resource Overview** shows the resource workloads in graphical form

Resources are employees or objects used for work such as rooms, vehicles or machines. InLoox differentiates between internal resources (i.e. Exchange Server mailboxes) and external resources (i.e. email and fax contacts). InLoox uses the Free/Busy-Schedule of Microsoft Exchange Server for internal resources and integrates the information (**busy**, **tentative** and **out of office**) into the workload diagram. The diagram can be created for one project only or across many projects, according to the option selected

A brief summary of creating a plan including resource allocation is available

The dialog box **Resource Overview**

Element	Description
Workload diagram	• The view always filters the resources and workloads by the time period specified with Begin and End
	• Zoom by holding down the Ctrl key and scrolling with the mouse wheel
	• Duration and degree of the workload are shown by the **bars** in the area at upper right:
	• 100 % yellow bar (workload 1% - 100%)
	• 109 % red bar (workload 101% - 149%)

- 209 % dark red bar (workload over 150%)

- In the example shown the overloading of the resource "Dean Robertson" results from the occupation in two activities. If appointments are on record in the Outlook calendar of an Exchange resource, the resource counts as fully loaded (100%) in the given time period. To hide the calendar deactivate the option display Exchange calendar

- Today's date is shown by a vertical **red** day line

- ⚠ shows that an **overbooking** of a resource has occurred in the given time period. The workload for the resource is more than 100% at some time. The alert symbol does not indicate the duration or degree of the overbooking

- 🌐 indicates an **external resource**.

- A click on the plus sign (➕) beside a resource displays the workload details. These include the projects and activities to which the resource is assigned and, in the case of internal resources, also the Outlook calendar. The details of the resource can be hidden with the minus sign (➖). A click on an activity centers the workload overview on it

- If the Resource overview is called up from within a project, activities from other projects are shown in grey

- Placing the mouse over a bar causes details to be displayed:

  Brainstorming
  Start: 1/7/2010 8:00:00 AM
  End: 1/8/2010 4:00:00 PM   Duration: 1 day 8h

  The percentage indicates the **workload** of the resource. The time period and duration show the length of the workload

- A **click** on a resource displays a graphical overview of the workload data within the selected time period. These include the projects and activities to which the resource is assigned and, in the case of internal resources, also the Exchange calendar

Legend

Each workload is shown in the workload diagram as a **colored area**. InLoox marks these areas as follows:

- 🟨 indicates: **resource** is occupied (in project activity or Outlook calendar)

- 🟨 indicates: **resource overloaded** (total workload **over** 100 %)

- an **empty field** indicates: the resource is **free** during the corresponding time period *or* **no occupation data** are available

Start / End

Specifies the time period for which the resource workload is to be determined

ℹ Note: All resources which are not occupied during the specified time period are hidden. Use the button Add resource (➕) to always display resources with whom/which you often work, regardless of the dates specified

Zoom (🔍/🔍)

Changes the view of the workload diagram. Possible values:

- Years

- Quarters

- Months

- Weeks

- Days

- Hours

Refresh (↻)	Reloads the view. All information is refreshed
Filter	Specifies which resources are to be included in the overview. Possible values:

- All projects (= no filter)

- This project only (= filter is current project)

- This activity only (= filter is current activity) (The Resource Overview dialog has to be called out of the activity for this option)

ⓘ Note: Use the button Add resource (➕) to always display resources with whom/which you often work, regardless of the dates specified

Add resource(➕)	Opens a dialog box for resource selection. Use this button to always display resources with whom/which you often work, regardless of the filters specified
Delete resource (✖)	Removes the selected resource from the view. Use this button to always hide resources regardless of the filters specified. The configuration is stored for each user and therefore does not affect the resource overview of other users

ⓘ Note: Click with the right-hand mouse button on the resource list at upper left. Select the menu command Display deleted resource(s) to reintroduce all resources previously deleted

Options	A click on the button **Option** opens a menu with the following commands:

- Show Exchange calendar: Displays or hides the data from the Free/Busy-Schedule of an Exchange Server. When activated InLoox takes account of the calendar data when calculating the workload

- Show Workload Labels: Displays the descriptions of the work packages at upper right

- Include all projects in overview: If this option is active, the resource overview also includes activities from other projects. This option is only available when the resource overview is called up from within a project

- **Show Completed Activities**: If this option is active, also the activities with the state done are shown

Print	Prints the resource overview. Clicking on this button causes the dialog box **Print** to be displayed
Close	Closes the dialog box
Context menu of the resource list	The following menu commands are available:

- **Reload Overview** (↻): Reloads the view. All information is refreshed

- Add resource (➕), Delete resource (✖)

- **Reset View**

- Expand All groups / Collapse All groups: Changes the resource view and hides or displays the workload details for all resources

- Show Exchange calendar

- Show Workload Labels

- Show Completed Activities

Notes

Information from the Free/Busy-Schedule feature of Microsoft Exchange Server **cannot** be called up:

- at any time for **external resources**

- in offline mode for **internal resources**

Time Tracking Page

TIME TRACKING PAGE

The **Time Tracking** Page contains all time tracking entries performed, work carried out and events recorded for a project. You can link items and documents to improve transparency

Information on the **Time Tracking** Page:

- **Details** of the page areas: Time Tracking

- **Concise instructions** are available: Record time tracking items or document

- Description of the **dialog boxes**: New Item / Edit Item
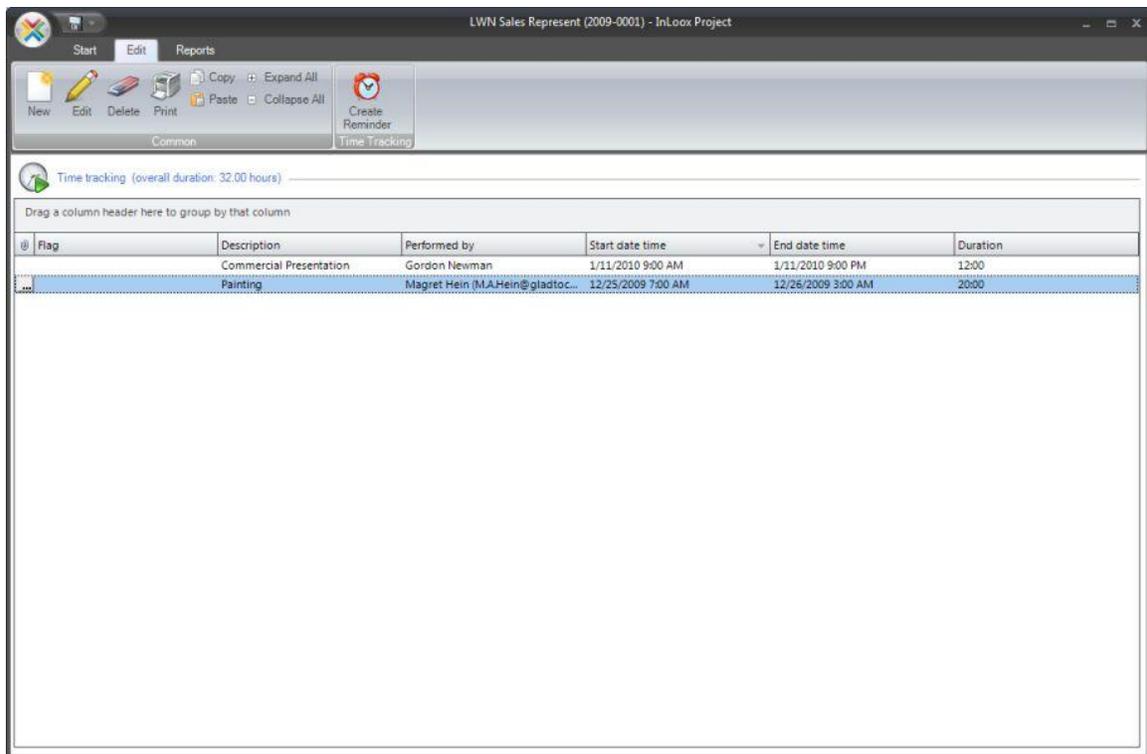
TIME TRACKING PAGE: TIME TRACKING AREA

Detailed information on the **Time Tracking** Page: elements, features and descriptions

The **Time Tracking** area:

Element	Description
New	Creates a new entry in the list of time tracking. Permission is required. Clicking on the button causes the dialog box **New Item** to be displayed
Edit	Changes the selected entry in the list of time tracking. Permission is required. Clicking on the button causes the dialog box **Edit Item** to be displayed
Delete	Deletes the selected entry from the list of time tracking. Permission is required
Report...	Copies the contents of the list of time tracking into a report. The report templates can be customized. Permission is required. Details can be found under Customizing Report Templates
Print...	Starts the quick print feature of the list of time tracking
List of time tracking items	- An entry contains the following data: Description, Flag, Start, End, Duration, Group, Time tracking item, Performed by, Modified by, Link indicator - Each entry carries a **flag** (none, 🚩 , 🚩 , 🚩) - A **paper clip** (📎) shows that one or more **documents** are link to the time tracking item. A click on the paper clip and then on the button "**...**" opens a menu with the linked documents - The **total duration** of all entries is displayed - The list is sorted by **date** in descending sequence and can be grouped and sorted just like an Outlook list - A **popup menu** is displayed on clicking with the right-hand mouse button. The following commands are available: **New..., Edit..., Delete**, change the view (**Choose fields**) and **Create reminder** for the time tracking item in the Outlook calendar - A padlock symbol displayed in the list shows that you have no read permission. In this case no item will be displayed

TIME TRACKING PAGE: DIALOG BOX NEW ITEM / EDIT ITEM

Detailed information on the **Time Tracking** Page: Described here is the method for creating a new time tracking item or edit an existing one. An item is a part of a project used by InLoox as documentation and for recording work done and time spent

Concise instructions for creating a time tracking item are available

The dialog box **New Item / Edit Item**:
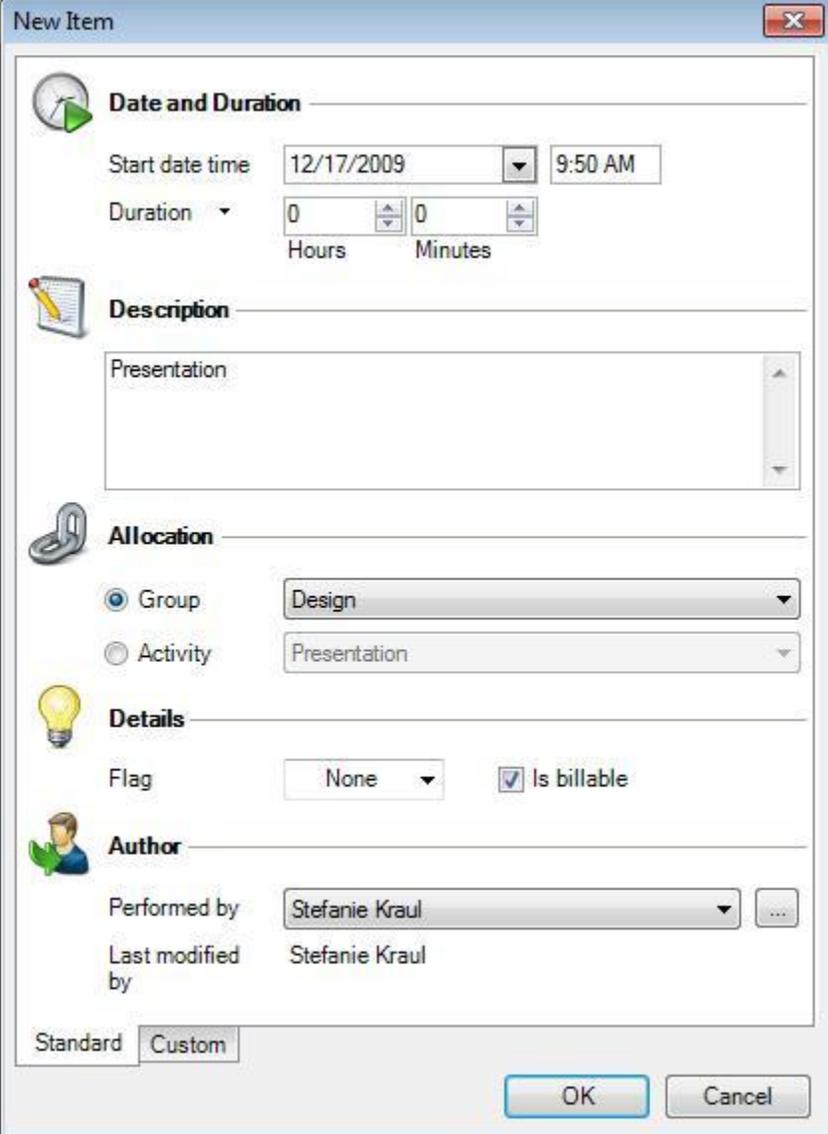
Element	Description
Entry of (*)	Day and time on which the item was created. When creating a new item today's date and the current time of day are proposed and can be changed

Duration (*)	Duration of the item. Enter the time required in the format or an end date.
Flag	Select a flag for the item (none, ⚑ , ⚑ , ⚑)
Description	Multiple-line free text for documenting significant facts about the item. Typical data are Location, names of persons involved, results of meeting or internal remarks
Activity (*)	Activity or milestone to which the item belongs. Activities and milestones can be created on the **Planning** Page
Group (*)	Group to which the item belongs. The group is a sort criterion or a project cost center
Performed by (*)	Name of the person who has carried out the item
Last modified by	Name of the person who created the item or last edited it
"Custom" page	Used to input and display supplementary information such as **Billing information**, **technical abbreviations**, **Document category** etc. New fields can be added as described under **Edit Custom Fields**

ⓘ Notes

(*) These fields are **mandatory inputs** when creating and editing items

Each **group** has an internal and an external price. The prices and the available groups can be customized under **InLoox Options**

Documents Page

DOCUMENT PAGE

The **Document** Page provides a straightforward project document management facility under Outlook. Windows files, folders, Outlook elements and Internet links can be filed separately for each project and called up at any time. InLoox employs links internally to save storage space and avoid duplicates and is able to access **SharePoint portal server document libraries**. Details can be found in the chapter on Document Management Technology

Information on the **Document Page**:

- **Details** of the page areas: Documents, files & links

- **Brief summaries** are available: Saving files and documents, Attachment Management

- Description of the **dialog boxes**: New Document / Edit Document, Select Document Folder
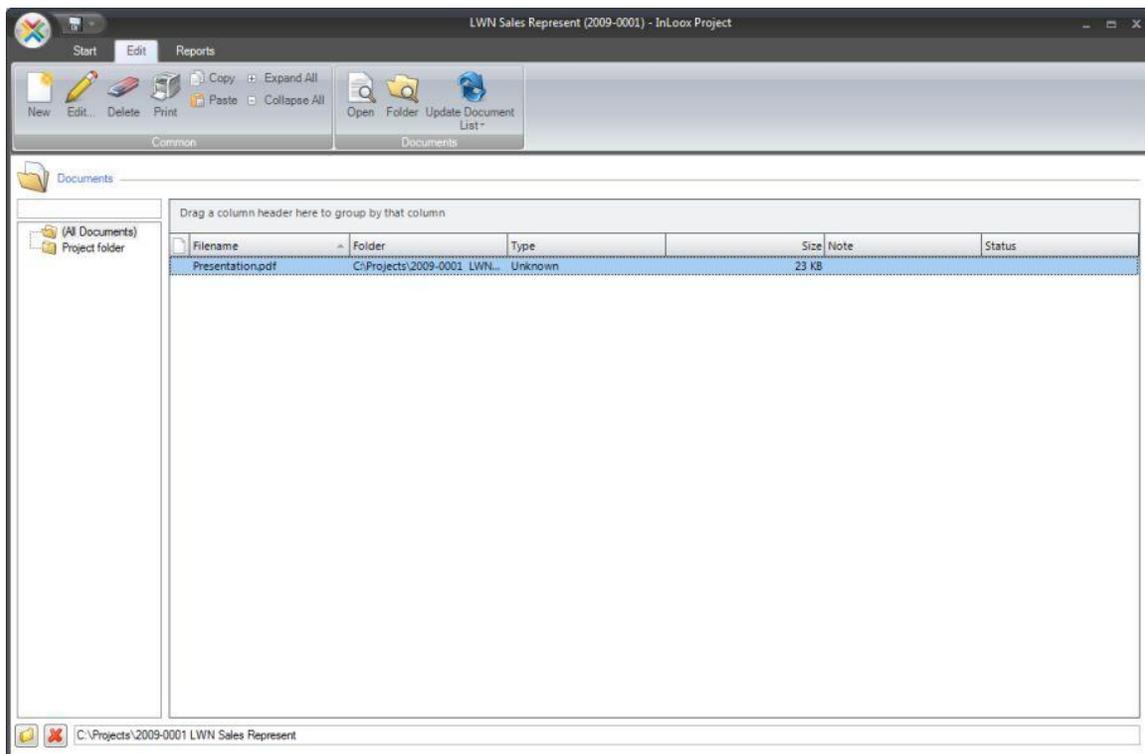
Update Document list:

Within the **section documents** you can read in single documents as well as **whole folders**. With this you can save yourself several single steps.
Proceed as follows:

1. **Open** the project

2. Chose the section "**documents**"

3. Click on the **folder symbol in the lower menu bar**
   *The dialog **Select Document Store** will be displayed*

   - Chose the **folder you want to be read in**

4. Chose **Update Document Lis**t in the upper menu bar

5. The content of the folder will be read in the document section of the project. You can work with it right away.

Please note:
Using this feature makes the update of folders easier. as soon as new documents are entered, proceed as described.

Clean Document Folder:

If **data is removed from the document store** and hence isn`t available for InLoox anymore, proceed as follows:

1. **Open** the project

2. Chose the section "**documents**"

3. Select the **context menu by right clicking**, chose the document folder you want to be cleaned
   *The dialog **Clean Document Folder** will be displayed*

   - You can clean the document storage now

   - **CAREFUL!** Information can get lost!

4. Click on Yes

DOCUMENT PAGE: TECHNOLOGY

Detailed information on the Document Page: The InLoox document storage and management technology is based on intelligent links within Microsoft Outlook, Microsoft Windows and Microsoft SharePoint Server. The advantages of this method are:

1. Virtually no additional storage space required, keeping InLoox projects lean

2. File rights are inherited. If for example you add a file from a protected network folder or SharePoint store to the InLoox storage, the file can still only be read and updated by authorized users - at no additional cost

3. Backup and existing version and document management applications can still be used

Notes:

- InLoox is able to arrange documents automatically if required. The base folder to be used by InLoox for this purpose can be defined under **InLoox Options**

- Details of the Document types supported by InLoox

DOCUMENT PAGE: DOCUMENT TYPES

Detailed information on the Document Page: InLoox supports the following document types:

Document Types	Examples
Outlook elements	- Emails (Inbox, Outbox, Sent, Archive) - Contacts - Tasks - Journal entries - Calendar entries - with or without **file attachments** Details can be found in the chapter on Attachment Management
Files	all Windows-readable files
Links, **Internet links**	- www.inloox.com - www.exchange-server.com/inbox/mail-inloox.htm - C:\link to Desktop.lnk - Z:\ (complete network drive)
SharePoint elements	- compatible with **SharePoint Portal Server 2003** and **SharePoint Server 2007** - Sites that support document libraries - Folders and subfolders - File objects

DOCUMENT PAGE: DOCUMENT LIST AREA

Detailed information on the **Document** Page: elements, features and descriptions.

The **Document** Area:

Element	Description
New...	Creates a new entry in the document list. Permission is required. Clicking on this button causes the dialog box **New Document** to be displayed
Edit	Changes the selected entry in the document list. Permission is required. Clicking on this button causes the dialog box **Edit Document** to be displayed
Delete	Removes the selected document from the list. Permission is required. The document itself can also be deleted. If you want to delete the document physically answer the security query: "**Do you really wish to delete the selected document from the project folder? This action cannot be reversed**" with **Yes**
Print...	Starts the quick print feature of the document list
Open	Opens the selected document or starts the relevant application, e.g. **Adobe Acrobat** **Note**: Permission is required. Details can be found in the chapter on Document Management Technology
Folder	Opens the document folder in Windows Explorer or the web browser (in the case of a **SharePoint** document library)
Update Document List	Refreshes the **Document Folder List** and the **Document List** by reading all entries of the file store or SharePoint system. Detailed information on the **Document** Page
Clean Document Folder	Removes all orphaned entries of the **Document List**. Detailed information on the **Document** Page
Document Folder List (left)	• The entry **(All Documents)** displays all the documents of the project file store including **all** subfolders in the **Document List**. • The entry **project folder** displays all the documents of the project file store **excluding** subfolder contents • The entry **project folder** can contain **subentries** by the means of a tree structure, representing the physical structure of the file store or the SharePoint system.
Document List (right)	• An entry contains the following data: filename, size, type, state, note, created on, changed on, folder, path. If the element was added to the project using the button **Add element**, the following is also included: Outlook sender, Outlook topic, Outlook received on. If the project document folder is a **SharePoint** document library, the following is also included: SharePoint author, SharePoint operator, SharePoint document library, SharePoint site, SharePoint subfolder • The list can be sorted and grouped just like any Outlook list • Documents can be added to the list via **Drag and Drop**. Documents are copied to the same time to project folder automatically. If the keys **Ctrl** and **Shift** are held down during drag and drop, the documents are not copied to the project folder, but merely linked from their original location • The documents can be updated by using the toolbar button **Update Document List**. The documents are updated **automatically** every time a project is opened, provided that the corresponding option has been activated in the **InLoox Options** • You can also **actualize and revise the document list** by using the toolbar buttons • A click with the right-hand mouse button causes a **context menu** to be displayed. The

following commands are available: **Open, New..., Edit..., Delete, Refresh file list**, change the view (**Choose Fields**) and **Properties** of the file concerned

- A padlock symbol shows that you have no read permission. In this case no documents will be displayed

Folder... button

Changes the **document folder**. The dialog box Select document folder is displayed. Please note that with a change of folder the existing documents remain where they were

Delete button

Restores the **document folder**. InLoox selects the **document folder** anew according to the **document folder rule** as soon as a new document is added to the project

Document folder

In new projects no **document folder** is defined. When documents are added for the first time, InLoox will create the **document folder** according to the **document folder rule**. This can be customized under **InLoox Options**

DOCUMENT PAGE: DIALOG BOX NEW DOCUMENT / EDIT DOCUMENT

Detailed information on the **Document** Page: Described here is the method for adding a new document to the list or modifying an entry in the document list. A document is a part of a project and is, according to **type**, an *Outlook element* (e.g. an email), a *File* (e.g. PDF, Word, Excel or AutoCAD) or an *Internet link*. Details can be found in the chapter on Document Management Technology

A brief summary of Storing Files and Documents is available

The dialog box **New Document / Edit Document**:
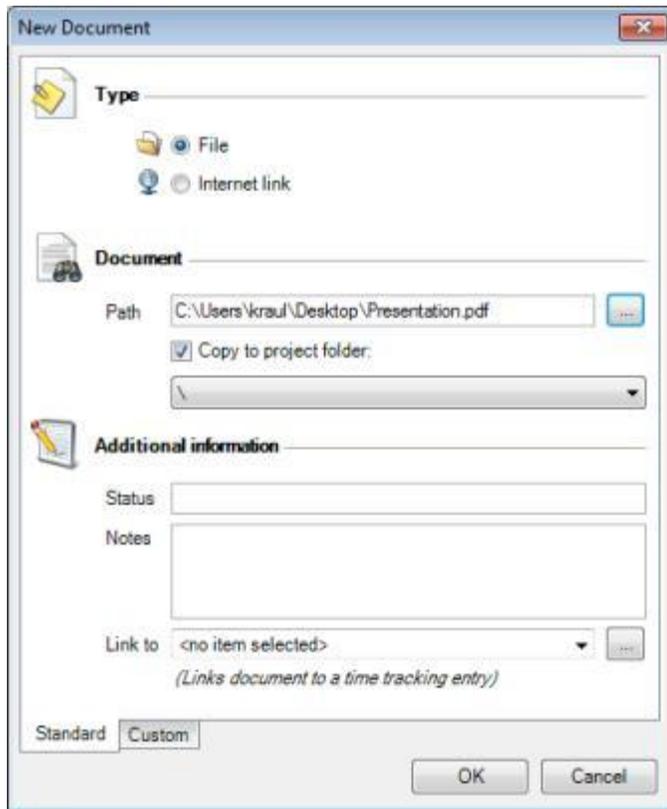
Element	Description
Type (*)	Select the type of document: • File (**Office**, **PDF**, **ZIP**, **AutoCAD** etc.) • Internet link, e.g. **www.inloox.com**
Path (*)	Specify here the location of the document. A click on the button "**...**" opens a dialog box for **Browsing**
Copy to project folder:	Specify here whether the document is to be copied into the project **document folder**. More information can be found in the chapter on Document List
Subfolder selection list	Select a subfolder into which the document is to be copied

State	Change instructions, e.g. **release** or **completed**
Note	Multiple-line text field for notes and comments
Link to	Permits a document to be linked to a time tracking entry. The document is then displayed in the Time Tracking area on the Time Tracking page with a **paper clip** ( ) and can also be called up from there. A click on the button "**...**" opens a dialog box for selecting an time tracking item
Note	(*) These fields are **mandatory inputs** when creating or modifying document list entries

DOCUMENT PAGE: DIALOG BOX SELECT DOCUMENT FOLDER

Detailed information on the Document Page: Described here is the method for changing the document folder of a project. Please note that when changing then folder the existing documents remain where they are.

The dialog box **Select document folder**:

Element	Description
Document storage type	Select a type of document storage: • File server or local computer (storage in file system) • SharePoint portal server (storage in a SharePoint document library)
Storage location	Specify, according to document storage type: • **Path** if a file server or local computer was selected as document storage type. A click on the button "**...**" opens a dialog box for a **browsing** • **Site**, **library** and **folder** (optional) if a SharePoint portal server was selected as document storage type.

Budgets Page

BUDGET PAGE

The Budget Page provides an overview of available budgets of the project based on planned revenues, planned expenses, actual revenues and actual expenses. New budget documents can be created in InLoox and exported to **Microsoft Excel**, **Microsoft Word** or as a **PDF file**. It is possible to monitor the state and manage individual positions directly from Outlook.

Information on the **Budget** Page:

- **Details** of the page areas budget list (at left), position list (at right)

- **Brief summaries** are available on Creating a budget, Creating an actual revenues, Project controlling

- Description of **dialog boxes** New Budget / Edit Budget, New Position / Edit Position

BUDGET PAGE: BUDGETS AREA

Detailed information on the **Budget** Page: elements, features and descriptions.

The **Budgets Area** within the Budget Page (at left):

Element	Description
New Planned Expense	Creates a new entry in the list of budgets (at left). Permission is required. Select a **budget type**. The dialog box **New Planned Expense** is displayed Note: The budget type governs the placing of the budget in the Budget Overview
New Planned Revenue	Creates a new entry in the list of budgets (at left). Permission is required. Select a **budget type**. The dialog box **New Planned Revenue** is displayed Note: The budget type governs the placing of the budget in the Budget Overview
New Actual Expense	Creates a new entry in the list of budgets (at left). Permission is required. Select a **budget type**. The dialog box **New Actual Expense** is displayed Note: The budget type governs the placing of the budget in the Budget Overview
New Actual Expense	Creates a new entry in the list of budgets (at left). Permission is required. Select a **budget type**. The dialog box **New Actual Expense** is displayed Note: The budget type governs the placing of the budget in the Budget Overview
Edit Budget	Changes the selected entry in the list of budgets. Permission is required. Clicking on this button causes the dialog box **Edit Budget** to be displayed
Delete Budget	Deletes the selected entry from the list of budgets. Permission is required
Print	Starts the quick print feature of the list of budgets or budget positions
List of Budgets	• An entry contains the following data: Type (planned expenses, planned revenues, actual expenses, actual revenues), Sequence number, Date, State, Name, Amount, Budget neutral Created by, Created on, Changed by, Changed by • Each entry has a **unique number** • Each entry has a **state**, which is freely definable. More information can be found in the chapter on Edit budget states • The **Total amount** of all Positions included in the budget is displayed. In the case of budgets of type *Calculations* und *Expenses*, the proportion of **positions** so far billed by *actual revenues* is also displayed • The list is sorted by **date** in descending order and can be grouped or sorted in the same way as an Outlook list • The first entry in the list is **generated automatically**. This budget (titled "Expenses (actual, time record)") contains all time record entries of the project as positions. **It cannot be changed manually** • A **popup menu** is displayed by clicking with the right-hand mouse button. Available commands are **New**, **Edit...** and **Delete**; **Generate actual revenue** (for actual expenses and planned expenses only); **State**, to alter the state of the budget and **Choose fields** to customize the view • A padlock symbol displayed in the list indicates that you have no read permission. In this

case no budgets can be viewed

BUDGET PAGE: DIALOG BOX NEW BUDGET / EDIT BUDGET

Detailed information on the **Budget** Page: Described here is the method for creating a new budget document or editing an existing one. A budget is part of a project and can refer to plan revenues, plan expenses, actual revenues and actual expenses depending on the **Type**. A budget has a state and usually contains positions

Brief summaries of how to create a budget and create an actual revenue are available

The dialog box **New Budget / Edit Budget**:

Element	Description
Number	A unique budget number, formed from the **type** and a **sequence number**. The number cannot afterwards be changed and is not re-issued after the budget is deleted
Date (*)	Day on which the budget was created. When creating a new budget, today's date is always proposed but can be overwritten
State (*)	Select a state for the time tracking item (**open**, **accepted**, **rejected**). Use **open** for example for offers not followed with an order or unpaid invoices If the parameter **Standard**, is selected, the current state will be applied as standard to all new projects from then on **State** is freely definable. More information can be found in the chapter on Editing Budget States
Name	Budget name. Any text can be used; the standard option, depending on type, is **Expenses (planned)/Revenue (planned)/Expense (actual)/Revenue (actual)** and is proposed automatically but can be changed. Use a unique name to make it easier for you and your customer to assign a budget unambiguously outside of InLoox.
Created by (*)	Name or person creating the budget
Copy position	It is possible to copy positions from one existing budget document to another. This is particularly useful for the following:

- Transfer an position from a rejected calculation to a new one and subsequently edit or delete it

- Bill position from a budget of type actual expenses or plan expenses with InLoox directly. Please refer to the Brief Summary of Billing

Concise instruction for Adding Positions are available

"Custom" Page	Used to input and display supplementary information such as **Billing information**, **technical abbreviations**, **Document category** etc. New fields can be added as described under **Edit Custom Fields**
Note	(*) These fields are **mandatory inputs** when creating and editing budgets

PAGE BUDGET: DIALOG LOAD BUDGET POSITION TEMPLATE

Detailed Information on the Budget page: How to load a budget position template

Brief instruction for loading a template:

1. Open a project

2. Select a Budget from the budget page

3. Click on the **Load Template** button
   *The dialog box **Load Budget template** is displayed:*
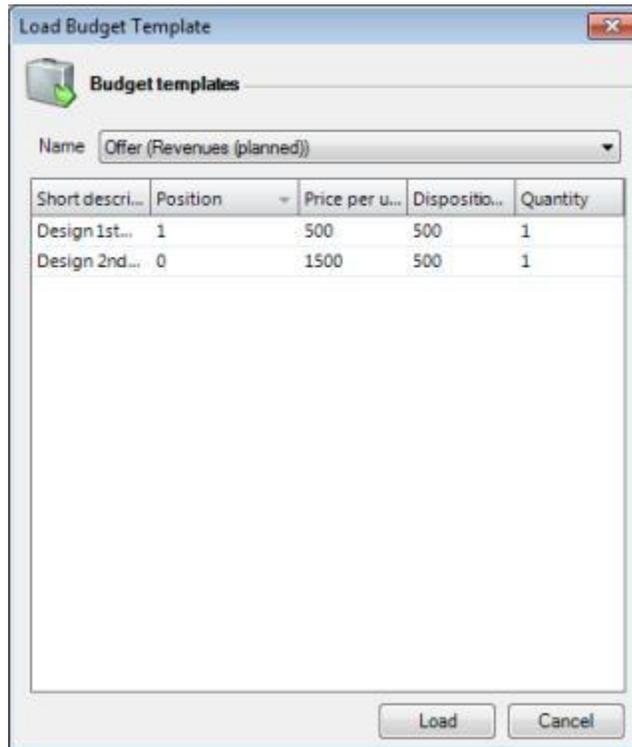
4.

5. Choose a template

6. Click on **Load** to load the selected template

PAGE BUDGET: DIALOG SAVE BUDGET POSITION TEMPLATE

Detailed Information on the Budget page: How to save a budget position template

Brief instruction for saving a template:

1. Open a project

2. Click on the Save Template button in the **budget page**
   The dialog box **Save budget Position as template** *is displayed:*
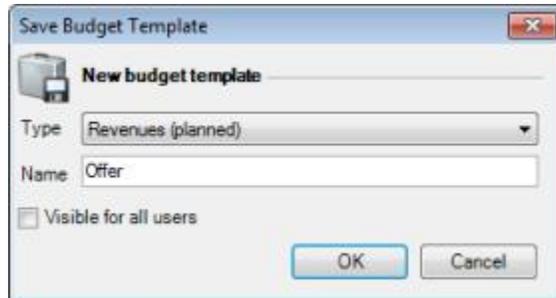
3.

4. Choose whether you want to save **all** positions or only **selected** positions as template

5. Choose a budget type for your template (Expenses (planned), Expenses (actual), Revenues (planned), Revenues(actual))

6. Enter a template name

7. Activate the **Visible for all users** check box, if you want to provide this template to all InLoox users

8. Confirm with **OK**

This template is now available in all other projects on the budget page (Page Budget: Load Template)

BUDGET PAGE: POSITION LIST AREA

Detailed information on the **Budget** Page: elements, features and descriptions.

The **Position List Area** within the Budget Page area (at right):

Element / Action	Description
Double-click **on empty field or symbol**	Creates a new entry in the position list (at right). Permission is required. A click on this button causes the dialog box **New Budget Position** to be displayed
Double-click **on an entry**	Changes the selected entry in the position list. Permission is required. A click on this button causes the dialog box **Edit Position** to be displayed
Key <DEL> or symbol	Deletes the selected position from the list. Permission is required
Symbol	Moves the selected position towards the top of the list. Permission is required
Symbol	Moves the selected position towards the bottom of the list. Permission is required
List of positions	• An entry contains then following data: Sequence number, Description, Group, Amount, Quantity, Unit, Unit price, Unit selling price (optional for budget types **planned expenses** and **actual expenses**), Billed (optional for budget types **planned expenses** and **actual expenses**), Line item number, Created by, Created on, Changed by, Changed on, Carried out on (with actual expenses(time tracking) this is the start date of the time tracking item) • Each entry has a **unique number** • Entries in the list are sorted in descending **order of creation** and can be custom sorted manually (using the buttons and) and grouped the same way as an Outlook list • The **Total amount** of all entries is displayed if the list is grouped by a specific column • A **popup menu** is displayed by clicking with the right-hand mouse button. Available commands are **New**, **Edit...** and **Delete**; **Position(s) billed** and **Choose fields** to customize the view

BUDGET PAGE: DIALOG BOX NEW POSITION / EDIT POSITION

Detailed information on the **Budget** Page: Described here is the method for creating a position or editing an existing one. Budget positions are included in a budget. Positions included in a budget document of type planned revenues, planned expenses, actual revenues or *actual expenses* can be **billable**, **billed** or not.

A brief summary on the creation of a budget including position is available

The dialog box **New Position / Edit Position**:

Element	Description
Group (*)	Select from the list a group to which the position belongs. The group defines the structuring of position within the system **Note**: The groups can be customized under **InLoox Options**
Position	Select the required position from the list. If such an position is not on file, it can be **input manually** **Note**: The dialog box **Edit Budget** can be used to create new position templates or customize existing ones
Name	Short position name. Can be changed

Description (*)	Multiple-line description of the position. Can be changed
Provision date	Date of carrying out or delivery. With actual expenses(time tracking) this is set automatically to the start date of the time record item
billed	Only for positions from budgets of type *actual expenses* or *planned* expenses. This is set automatically once the position (or the entire document) has been billed A click on the parameter sets this state **manually.**
billable	Only for positions from budgets of type *actual expenses* or *planned* expenses. Positions with this state are not include in actual revenues. A click on the parameter sets this state **manually.**
quantity (*)	Input the quantity of the selected unit, e.g. **95** or **2.34**. A credit can be recorded by inputting a **negative figure**
Unit price, **Unit (*)**	The selected **Unit** is linked to the **unit price**. Select a unit if there is more than one or change the unit price manually All prices are excluding VAT because in InLoox only records net amounts. The VAT can be expressed separately in the **report templates**
Total (*)	Position amount ("Price per unit multiplied by quantity")
"Custom" Page	Used to input and display supplementary information such as **Billing information**, **technical abbreviations**, **Document category** etc. New fields can be added as described under **Edit Custom Fields**
Note	(*) These fields are **mandatory inputs** when creating and editing positions Each **group** has an internal and an external price. The prices and the available groups can be customized under **InLoox Options**

BUDGET PAGE: OVERVIEW AREA

Detailed information on the **Budget Overview** Page: elements, features and descriptions.

The Overview area gives an ongoing comparison between the amounts in **Management**, **Planning**, and **Budget**. A list of all amounts, cumulated by group, is displayed:

Element	Description
1st Column Group	One line is generated for each group **Notes**: • Amounts on columns **2-10** are cumulated by group • The line **Amount** shows the totals from each column • An internal price per hour is recorded for each **Group**. The internal prices per hour and the available groups can be customized under **InLoox Options** • If you insert an **individual price per hour** for the resources, the group costs will be ignored
2nd Column Planned expenses (resources)	Expenses of all activities from the **Planning** Page, for which resources were recorded with time spent. Method: For each activity the time spent of all **Resources** is multiplied by the Group Purchasing Costs. All activity expenses are cumulated by group
3rd Column Planned expenses (other)	**All planned expenses** from the **Budget** Page Method: Budget documents of type **planned expenses** are totaled and/or cumulated by group
4th Column Planned revenues	**All planned revenues** from the **Budget** Page Method: Budget documents of type **planned revenues** are totaled and/or cumulated by group
5th Column Planned margin	Variance between planned revenues and planned expenses (**Planned expenses - resources)** and **Planned expenses - other**) Method: **5th Column** minus (**2nd Column** plus **3rd Column**)
6th Column Actual expenses (time tracking)	**Actual expenses (time tracking)** from the **Budget** Page Method: **Actual expenses (time tracking)** are calculated automatically: Time tracking items from the Time tracking Page multiplied by the Group Purchasing Costs cumulated by group
7th Column Actual expenses (other)	**Actual expenses** from the **Budget** Page (other than Actual expenses (time tracking)) Method: Budget documents of type **Actual expenses** are totaled and/or cumulated by group
8th Column Actual revenues	**Actual revenues** from the **Budget** Page Method: Budget documents of type **Actual revenues** are totaled and/or cumulated by group

9th Column Actual margin	Difference between actual revenues and actual expenses (**Actual expenses (time tracking)** and **Actual expenses**) Method: **8th Column** minus (**6th Column** plus **7th Column**)
10th Column Cost variance (plan vs. actual)	Difference between actual margin and planned margin Method: **9th Column** minus **5th Column**
Status	A negative amount in the **10th Column** (Debit/Credit) is marked with a red dot (🔴). In this the actual margin is lower than the planned margin. Depending on the project objective, this can mean one of the following: • expenses exceed revenues • Revenues are lower than anticipated • Expenses are higher than anticipated
💡 Hint	It is possible to display the total costs, revenues, profit and cost overruns in the **InLoox Project Overview**. More information can be found in the chapter on Customizing Personalized Views

The bottom area shows the graphical amounts and totals of the budgets. The charts show all amounts cumulated by different criteria. You can switch between the several views by clicking on the **Chart Type** buttons.

The chart type **By Type** gives an ongoing comparison between the amounts in **Management**, **Planning**, and **Budget**. A list of all amounts, cumulated by type, is displayed:

Element	Description
Planned expenses (resources)	Costs of all activity from the **Planning** Page, for which resources were recorded with time spent. Method: For each activity the time spent of all **Resources** is multiplied by the Group Purchasing Costs. All activity expenses are cumulated by group
Planned expenses (other)	**All planned expenses** from the **Budget** Page Method: Budget documents of type **planned expenses** are totaled and/or cumulated by group
Planned revenues	**All planned revenues** from the **Budget** Page Method: Budget documents of type **planned revenues** are totaled and/or cumulated by group
Actual Expenses (time tracking)	**Actual expenses (time tracking)** from the **Budget** Page Method: **Actual expenses (time tracking)** are calculated automatically: Time tracking items from the Time tracking Page multiplied by the Group Purchasing Costs cumulated by group
Actual Expenses	**Actual expenses** from the **Budget** Page (other than Actual expenses (time tracking)) Method: Budget documents of type **Actual expenses** are totaled and/or cumulated by group
Actual revenues	**Actual revenues** from the **Budget** Page

Method: Budget documents of type **Actual revenues** are totaled and/or cumulated by group

The chart type **By Group** gives an ongoing comparison between the amounts in **Management**, **Planning**, and **Budget**. A list of all amounts, cumulated by group, is displayed:

Element	Description
Group 1,Group 2, …	Cumulated **Revenues (Planned revenues, Actual revenues)** and **Expenses (Planned expenses, Actual Expenses (Time tracking), Actual Expenses)** per used InLoox group Method: **Expenses(planned, resources)** per group **Expenses (planned, other)** per group **Expenses (actual, time tracking)** per group **Expenses (actual, other)** per group **Revenues (planned)** per group **Revenues(actual)** per group

In the Chart **By Date** each line represents the cumulated **Revenues (Planned revenues, Actual revenues)** and **Expenses (Planned expenses, Actual Expenses (Time tracking), Actual Expenses)** from a project over a predefine time range.

Element	Description
Planned expenses (resources)	Costs of all activities from the **Planning** Page, for which resources were recorded with time spent. Method: For each activity the time spent of all **Resources** is multiplied by the Group Purchasing Costs. All activity expenses are cumulated by record time
Planned expenses (other)	**All planned expenses** from the **Budget** Page Method: Budget documents of type **planned expenses** are totaled and/or cumulated by record time
Planned revenues	**All planned revenues** from the **Budget** Page Method: Budget documents of type **planned revenues** are totaled and/or cumulated by record time
Actual Expenses (time tracking)	**Actual expenses (time tracking)** from the **Budget** Page Method: **Actual expenses (time tracking)** are calculated automatically: Time tracking items from the Time tracking Page multiplied by the Group Purchasing Costs cumulated by record time
Actual Expenses	**Actual expenses** from the **Budget** Page (other than Actual expenses (time tracking))

Method: Budget documents of type **Actual expenses** are totaled and/or cumulated by record time

Actual revenues	**Actual revenues** from the **Budget** Page
	Method: Budget documents of type **Actual revenues** are totaled and/or cumulated by record time

The chart type **Expense vs. Revenues** gives an ongoing comparison between the amounts in **Management**, **Planning**, and **Budget**. A list of all amounts, cumulated by **Revenues (Planned revenues, Actual revenues)** and **Expenses (Planned expenses, Actual Expenses (Time tracking), Actual Expenses)**, is displayed:

Element	Description
Planned expenses (resources)	Expenses of all activities from the **Planning** Page, for which resources were recorded with time spent.
	Method: For each activity the time spent of all **Resources** is multiplied by the Group Purchasing Costs.
Planned expenses (other)	**All planned expenses** from the **Budget** Page
	Method: Budget documents of type **planned expenses** are totaled
Planned revenues	**All planned revenues** from the **Budget** Page
	Method: Budget documents of type **planned revenues** are totaled
Actual Expenses (time tracking)	**Actual expenses (time tracking)** from the **Budget** Page
	Method: **Actual expenses (time tracking)** are calculated automatically: Time tracking items from the Time tracking Page multiplied by the Group Purchasing Costs
Actual Expenses	**Actual expenses** from the **Budget** Page (other than Actual expenses (time tracking))
	Method: Budget documents of type **Actual expenses** are totaled
Actual revenues	**Actual revenues** from the **Budget** Page
	Method: Budget documents of type **Actual revenues** are totaled

🔆 **Hints**

- For switch series invisible or visible click on the corresponding buttons in the **Chart Data** area

- For display series labels and currencies click on **Show Values** in the Chart details area

RIBBON IN THE INLOOX PROJECT

The **InLoox Project** contains menus and toolbars. A description of all commands and buttons can be found here.

The **Management** Page is the principal starting point for anyone involved in the project. This aspect of InLoox can be looked upon as a **portal** through which all significant project data can be looked up and stored away in condensed, structured form.

The **Mind Maps** Page displays the mind structure and theme structure of a project. As example **descriptions and icons** of the themes can be recorded. Nodes of the Mind Map can be converted into planning elements. Links to files and internet addresses can also be assigned to specific planning elements if needed.
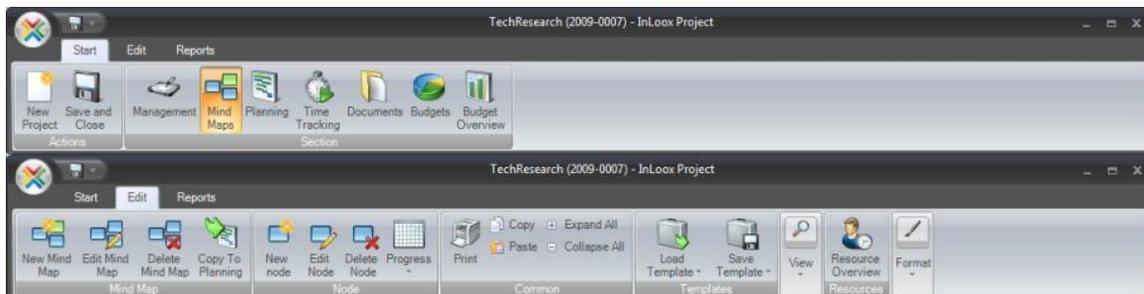
The **Planning** Page displays the activities, milestones and resources of a project. As example **descriptions** of the work steps can be recorded. Everyone who is involved in the project is kept automatically informed about the planning elements by InLoox or via Outlook. Links to files and internet addresses can also be assigned to specific planning elements if needed.

The **Time Tracking** Page contains all time record entries performed, work carried out and events recorded for a project. You can link items and documents to improve transparency.
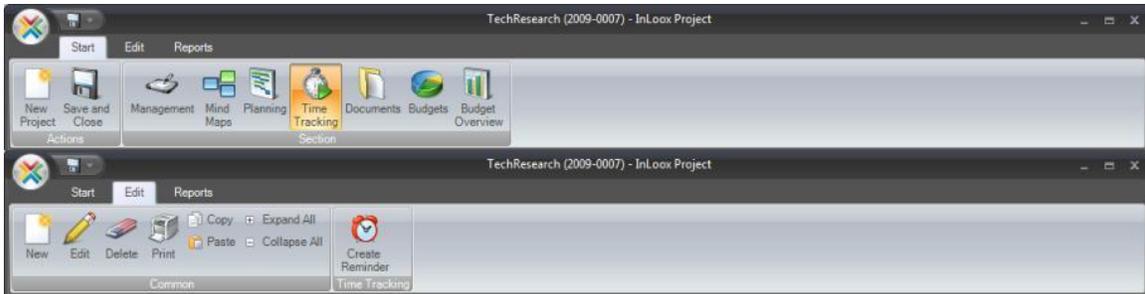
The **Documents** Page provides a straightforward project document management facility under Outlook. Windows files, folders, Outlook elements and Internet links can be filed separately for each project and called up at any time. InLoox employs links internally to save storage space and avoid duplicates and is able to access **SharePoint portal server document libraries**. Details can be found in the chapter on Document Management Technology.

The **Budget** Page provides an overview of available budgets of the project based on planned revenues, planned expenses, actual revenues and actual expenses. New budget documents can be created in InLoox and exported to **Microsoft Excel**, **Microsoft Word** or as a **PDF file**. It is possible to monitor the state and manage individual positions directly from Outlook.
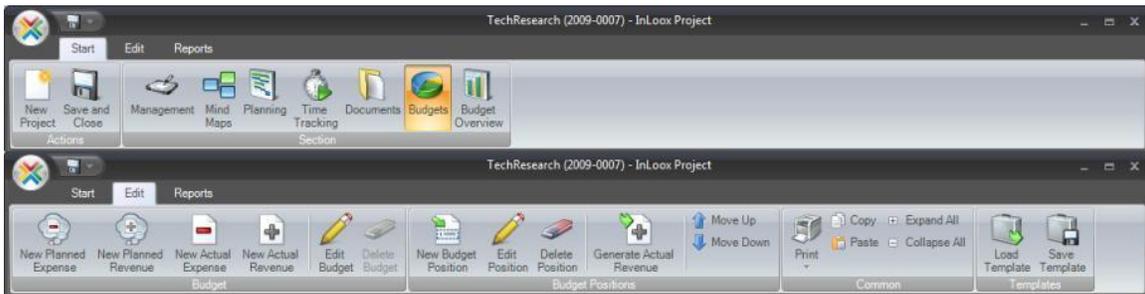
The **Budget Overview** area gives an ongoing comparison between the amounts in **Management**, **Planning**, and **Budget**. A list of all amounts, cumulated by group, is displayed:

MENU AND TOOLBAR IN THE INLOOX PROJECT

The **InLoox Project** contains menus and toolbars. A description of all commands and buttons can be found here.

The Menus:

Menu	Menu item	Description
File	New	Creates a new project
	Save	Saves the current project
	Import	Reads in data in the following formats: **Microsoft Project** (MPP), **Microsoft Project Exchange** (MPX). The data is displayed on the Project **Planning** Page
	Export	Writes out data from the Project **Planning** Page in the following formats: **Extensible Markup** (XML)
	Close	Closes the project window
Tools	Edit project number	Release the project number for editing until the project is saved
	Reports	Report generator. More information can be found in the chapter on Creating and Editing Reports
	Saved reports	List of saved reports. More information can be found in the chapter on Saving Reports
	Resource overview	Calls up the **Resource Overview**
	Update Document List	Updates the document list from the Project **Document** Page
	Critical Path	Shows the Critical Path on the Project **Planning** Page
	Categories	Calls up the dialog box Categories from the Project >**Management** Page
?	InLoox Help	Calls up InLoox online documentation
	InLoox Online	Opens the InLoox website
	Ideas and suggestions	Opens the InLoox feedback form
	Report an error	Opens the **Support Center**
	About InLoox	Opens a window with your InLoox version number

The toolbar:

Button	Description
Save and close	Saves the data from the current project and closes the project window
Resources Overview	Calls up the **Resource Overview**

Reports   Report generator. More information can be found in the chapter on Creating and Editing Reports

Update Document List   Updates the document list from the Project **Documents** Page

COPY & PASTE

You can copy following InLoox elements via **copy** and **paste**

- **Projects** (Project list, Time line, Archive)

- **Mind map nodes** with child nodes

- **Time tracking entries**

- **Planning elements**

- **Documents**

- **Budgets**

- **Budget positions**

A brief summary of how to copy an element:

1. Select the element you like to copy in the list

2. Copy the selected element via the short key **CTRL+C**, the context menu or via the associated button in the menu bar

3. Switch to the list, where the element should be inserted

4. Paste the selected element via the short key **CTRL+V**, the context menu or via the associated button in the menu bar

Hints

In the page **Planning** only elements are copied, not dependencies. You have to reassign these **dependencies manually**.

Documents are copied in the selected folder with the associated file.

To edit a copied project you have to assign a **new project numbe**r to it.

1. Open the copied project

2. Confirm the **Duplicate Project Number** Dialog with ok

3. **Assign a new project number**, either manually or automatically by InLoox

4. Save the project

InLoox Work Package Overview

INLOOX WORK PACKAGE OVERVIEW

Open an Outlook element or **Work package List**. The **InLoox Work Package Overview** can be seen on the right.

Each entry in this overview shows one planning notification in one project. A **typical view:**
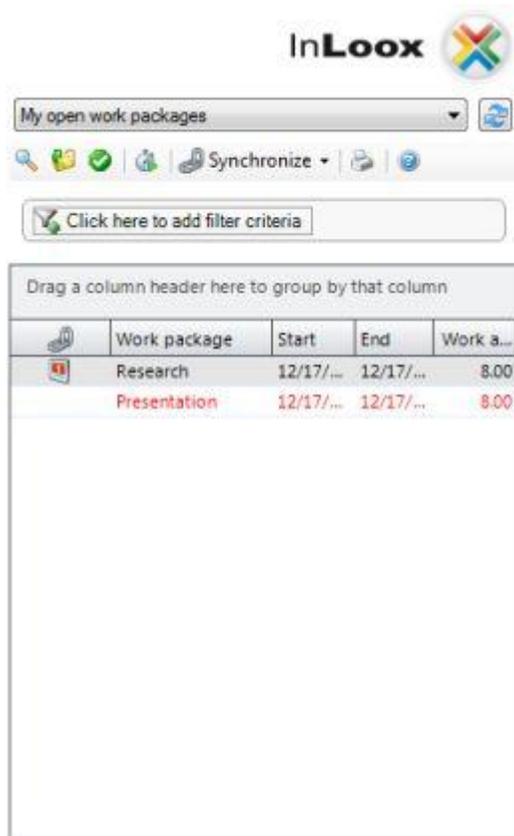
The **format** is as follows:

- work package displayed in **red** are **overdue**

- work package displayed in **black** are on time or completed (according to the selected view)

The following **views** are available:

Name	Description
My open work package	Personal work package with state "open" (i.e. "to be carried out")
My completed and inactive work package	Personal work package with state "completed"

Project manager's view (open work package)	Work packages of all members of projects of which you are manager (*) with state "open" (i.e. to be carried out")
Project manager's view (completed and inactive work package)	Work packages of all members of projects of which you are manager (*) with state "completed"

(*) If you have read permission for all projects (in InLoox Personal Edition this is always the case, in InLoox Workgroup or Enterprise Edition you will need a user-based permissions), all work package are displayed in the **project manager's view for all work package.**

All **open work package** assigned to you are displayed. These work packages containing planning elements. It is possible to create new work package in the **Planning** Page, in which, for example, you can assign a **resource** to an **activities** and inform them via the dialog box **InLoox**.

InLoox notifies new work packages to the user concerned and displays all work packages in their personal **InLoox work package overview**. When you receive a new work package, the dialog box **InLoox** is displayed:
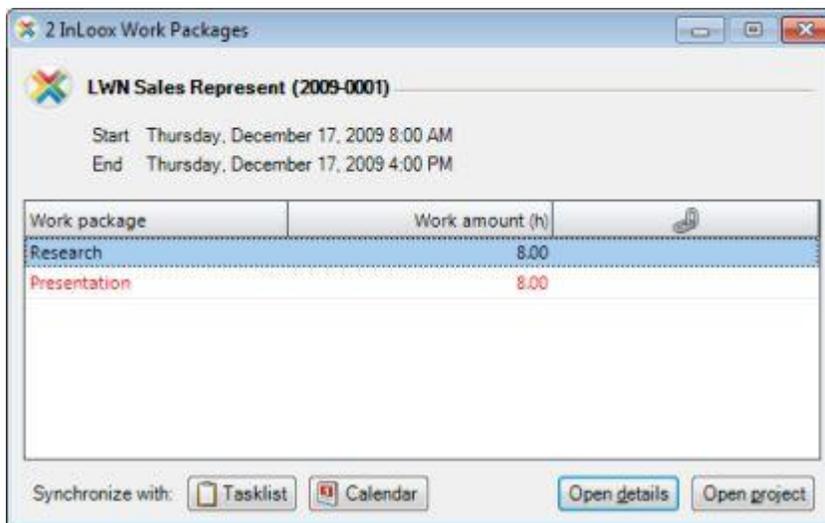
1. Select an entry from the list. The **planning data** are shown:

    - **Project name** and **number**

    - **Time frame** or **time**

    - Your personal **work amount** (in hrs.)

2. Click on one of the following:

    - **Open details**
      Additional information on the work package is displayed

    - **Open project**
      The project concerned is opened

    - Synchronize with **Task list / Calendar**
      Synchronize the selected element with the Outlook Task list or the Outlook calendar

3. The work package appears immediately in the **InLoox work package overview**. You will be **informed automatically** of any changes.

The principal **features** of the work package overview are:

- A double click on **an entry opens** the relevant **work package**.
  It is possible here to open the project or view the following details:

  - **Project name** and **number**

  - **Description**, **Start** and **End** of the work package

  - **Detailed description**

  - **Work amount** in hours

  - **State** (completed or open)

- Click with the **right-hand** mouse button on an entry to open a **popup menu** with the following commands:

  - **Display details** and **open corresponding project** (for description see previous section)

  - **Flag work package as completed**: Concludes the work package and moves it to the view "**My completed and inactive work package**" or "**Project manager's view (completed and inactive work package)**"

  - **Record time tracking entry** provides convenient access to the facility for time recording for the work package

  - **Synchronize with** synchronize the work package with the Outlook Task list or the Outlook calendar. All information of the synchronized outlook item will be keep up to date

  - **Update** refreshes the view

  - **Display filter** permits specific work packages to be included or hidden

  - **Select fields** shows a list of available columns

DISPLAYING AND PROCESSING WORK PACKAGES

A brief summary of how to transfer work packages to your calendar or task folder:

If you are planned into an InLoox project, the project planner can pass information to you in various ways:

- by automatic **Outlook task or meeting request**

- by automatic **email**

- by **InLoox**

Option 1: by **Outlook task or meeting request (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.

2. You see the following **planning data**:

    - **Project name** and **number**

    - **Time frame or date**

    - Your own **effort**

    - **Location**

    - involved **resources**

3. You have the following options:

    - **agree**, whereupon Outlook automatically creates an entry in your **task list** or **calendar.**

    - **decline**

   Outlook reports the response to the project planner. In the case of a task request the project planner is kept constantly formed about the progress of and changes to all tasks assigned to you.

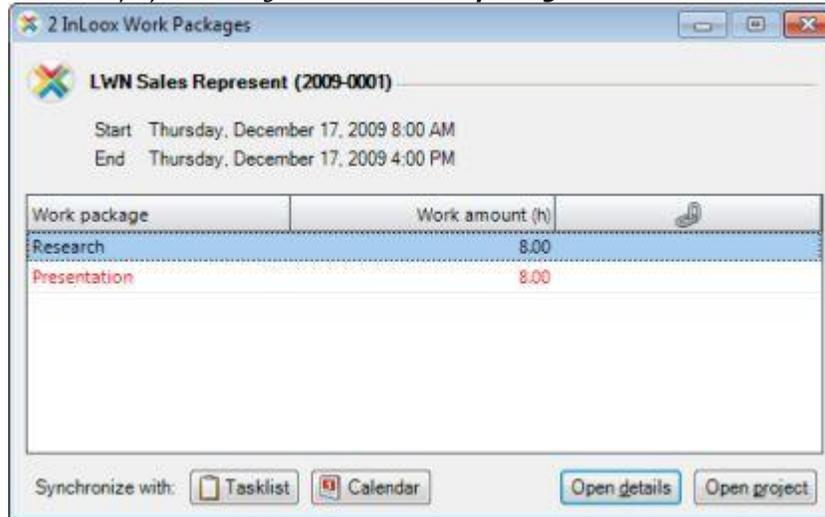Option 2: by **email (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.

2. You see the **planning data**:

    - **Project name** and **number**

    - **Time frame or date**

    - Your own **effort**

    - **Location**

    - involved **resources**

3. You have the following options:

- **accept** and create an entry in your **calendar or task list** manually.

- **decline** and reply in free form via your email software.

Option 3: by **InLoox task (*)**

1. *Outlook displays the dialog box* **InLoox work package**:

2. Click on an entry in the list. You see the **planning data**:

   - **Project name** and **number**

   - **Time frame or date**

   - Your own **effort** (in hours)

   - Current synchronization

3. Click on one of the following:

   - **Task list**
     InLoox work package is also synchronized with personal Outlook task list

   - **Calendar**
     InLoox work package is also synchronized with personal Outlook calendar

   - **Open details**
     Further information on the task is displayed

   - **Open project**
     The project is opened

4. You see the open InLoox tasks in the **InLoox Task Overview**. You are **informed automatically of any changes.**

(*) The type of communication is selected by the project planner. Users without InLoox can only be informed via **task request, meeting request or email**. The project planner can also decide to withhold information from a resource.

Continue to Storing files and documents

Quick Access Panels

QUICK ACCESS PANEL: TASKS AND CALENDAR

The **quick access panel contact** allows you to organize different details of projects and planning information much faster. Furthermore, Outlook tasks and Outlook calendar items can be synchronized with associated planning elements.
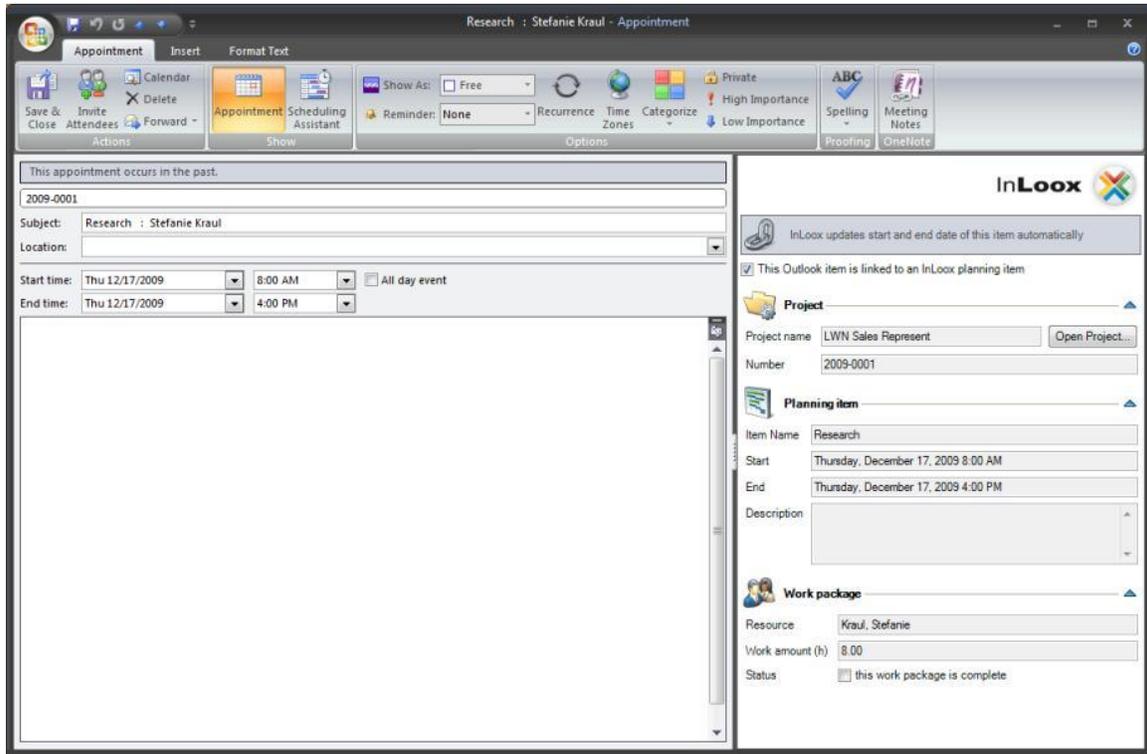
Brief instruction for synchronize a planning item with the Outlook Task list or the Outlook calendar from the project planning:

1. Open the **Page Planning** in a project

2. Select the planning element, which would you like to synchronize with Outlook.

3. Click on **"Synchronize with" (Outlook task, Outlook calendar)**
    A new Outlook element will be created in the Outlook Task list or the Outlook calendar

Brief instruction for synchronize a planning item with the Outlook Task list or the Outlook calendar from the project planning:

1. Open the **InLoox work package list** in Outlook

2. Select the work package, which would you like to synchronize with Outlook.

3. Click on **"Synchronize with" (Outlook task, Outlook calendar)**
    A new Outlook element will be created in the Outlook Task list or the Outlook calendar

Element	Description

|	
This Outlook item is linked to an InLoox planning item	Activate this check box, if you want to keep the start and end date of this Outlook item synchronized with the start and end date of the InLoox planning item
Project name	Name of related project
Number	Number of related project
Item name	Name of the InLoox planning item
Start	Start of the InLoox planning item
End	End of the InLoox planning item
Description	Description of the InLoox planning item

Hints

Start and end date changed from synchronized Outlook elements will be overwrite if the project plan is changed.
Moving a synchronized Outlook element by the user is no longer necessary.

QUICK ACCESS PANEL EMAIL

A significant advantage of InLoox quick access panel is its close integration with Outlook. To record activities (dates and effort) and documents (e.g. emails or attachments) for a project, use the quick access panel in a mail.
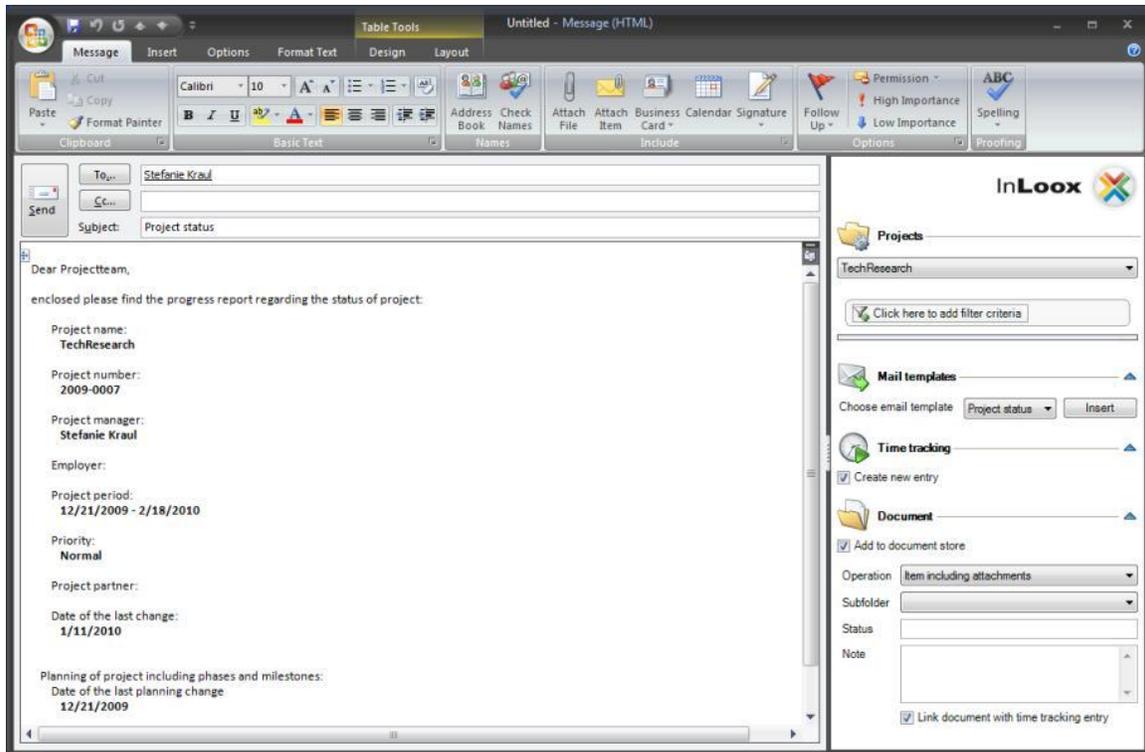
Proceed as follows:

1. Open for example an email from your personal Outlook inbox (or any other folder)

2. Select a project from the project list

3. Select the action to be taken:

   - **Create new item**
     Time tracking items are records of time spent for a project e.g. work carried out

   - **Add to document store**
     Documents are files assigned to a project

     1. Select the **Operation** InLoox is to carry out with the attachment - if any
        Details of this feature can be found in the chapter Attachment Management

     2. Select if required a **Subfolder**

     3. Select **Link document with time tracking item**

        InLoox will then display a paper clip (📎) in Time tracking item under the **Activity** tab.
        The paper clip can be used later to access all documents linked to the time tracking item.

4. Click on **OK**
   *If the option **Create new item** was selected, the dialog box **New Item** is displayed.*

5. Please enter at least the following:

   - **Date** and **Time** (these are set automatically and can be changed if needed)

- **Duration**

- **Group**, to which the time tracking item belongs
  or alternatively the **Activity** to which the time tracking item belongs

6. Click on the button **OK**

You can insert pre-defined and project based information text snippets very fast into a new email. Email templates can be added or modified vie the InLoox options.

Proceed as follows:

1. Open a new email

2. Select a project from the project list

3. Choose an email template

4. Add the selected email template with the **Insert** button
   The text template will be added to your email and the project manager of the selected Project will be inserted to the email recipients

QUICK ACCESS PANEL: CONTACT

The **quick access panel contact** allows you to access different details of projects much faster.
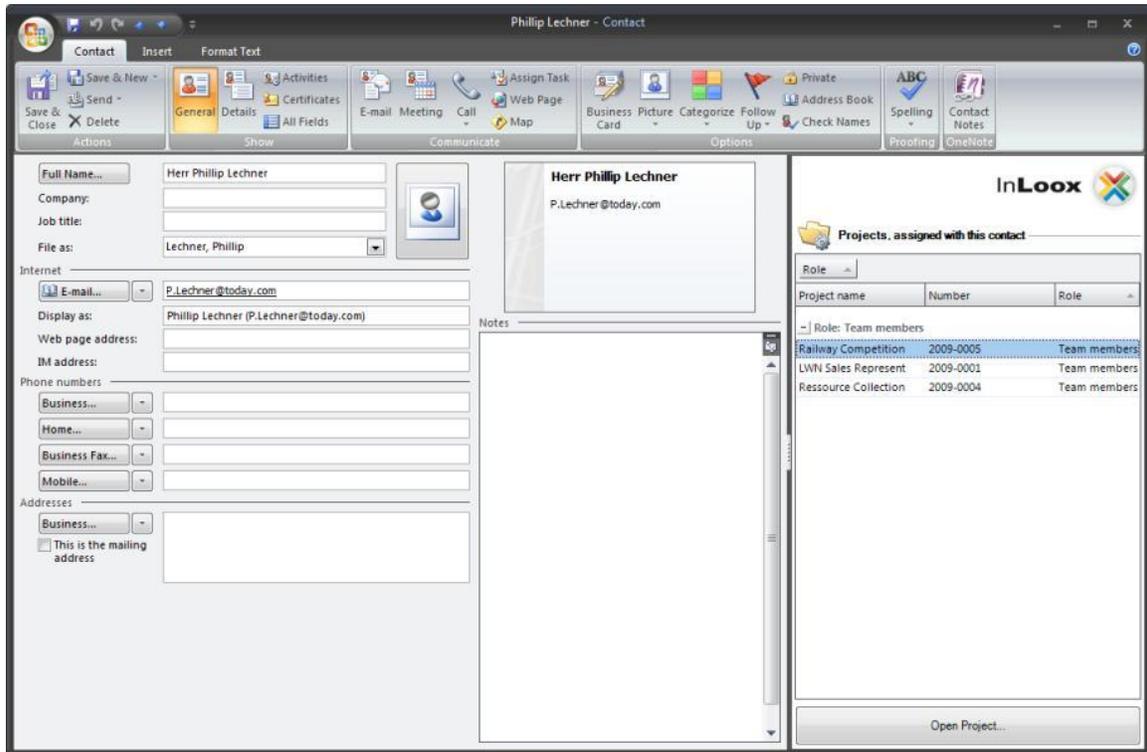
Brief instruction for **quick access panel contact**

1. **Open** you contact from the outlook contact list

2. Shown are all projects, assigned with the opened contact
   The standard grouping field is set to the project roles

Options

INLOOX OPTIONS

To Outlook 2003/2007 View

Outlook 2010 View

This chapter describes the changes to the basic parameters and the set-up of permissions in the InLoox software. To find out more about the customizing options of InLoox, please refer to the chapter on **Detailed Information: Configuration**

The administrator opens the **InLoox Options** as follows:

1. Click on the tab **File**

2. Click on **Options** in the navigation pane

Notes

⚠️To change global settings, users require the **Administrator** permission. More information on this topic can be found in the chapter on **Permissions**

User settings can be changed by any user

To Outlook 2010 View

Outlook 2003/2007 View

This chapter describes the changes to the basic parameters and the set-up of permissions in the InLoox software. To find out more about the customizing options of InLoox, please refer to the chapter on **Detailed Information: Configuration**

The administrator opens the **InLoox Options** as follows:

1. Click on the menu command **Tools** in the **InLoox Toolbar**

2. Click on **Options**

Notes

⚠️To change global settings, users require the **Administrator** permission. More information on this topic can be found in the chapter on **Permissions**

User settings can be changed by any user

General Options

INLOOX OPTIONS: NUMBER

The options page **Number** defines the format of the project number. There is a wide variety of customizing options. The format of the project number takes effect on the **Management** page.

⚠️Please note the possible **effects** when changing the project number format. These are described in this chapter.

Detailed description of **Number** page:

Project Number:

- It is possible to use a prefix (leading character string), a sequence number and a suffix (trailing character string)

- At least a **prefix** and a **sequence number** are required

- The **prefix** and **suffix** can be combined with the **sequence number**

Prefix and **suffix** are defined as follows:

Mode	Data type and significance
Any text	Any character string of any length, which can be **changed**
Fix text	Any character string of any length, which cannot be **changed**, e.g. the word **Project**
Regular expression	Input a **format** and an **example**. Please note the Format Rules When a project is created InLoox checks whether the project number used is of the format defined here. If not, a message is displayed asking the user to correct the project number.

Examples of common formats:

Example	Configuration
Four-digit year combined with sequence number (e.g. "Project 2010-008") components: • "Project 2010-" (fixed prefix with year) • "Sequence number" (maximum 3 digits with leading zeroes)	**Prefix**: Rule: **^Project \d{4}-$** Standard value: **Project 2009-** or **Project 2010-** **Sequence number**: Number of digits: 3 **Suffix**: none
Sequence number with country code components: • "Sequence number" (maximum 5 digits with leading zeroes) • Country code (-DE, -AT, -FR, ...)	**Prefix**: none **Sequence number**: Number of digits: 5 **Suffix**: Rule: **^-\w{2}$** Standard value: **-DE**
Simple sequence number • "Sequence number" (maximum 6 digits with leading zeroes)	**Prefix**: none **Sequence number**: Number of digits : 6 **Suffix**: none
Free format	**Prefix**: any text **Sequence number**: none **Suffix**: none

Effects of changing the number format:

- **New projects** are created automatically with numbers in the new format

- **Existing projects** retain their old numbers

- A sequence number, once used, **cannot be used again**.

NUMBER FORMAT RULES

The options page **Number** defines the format rules for project numbers. Please note the possible effects when changing settings. These are described in the chapter on InLoox Options: Number Page.

The following options are available:

Character	Data type and significance
.	Any single character
\d{COUNT}	Any numeric (0-9) with COUNT digits. COUNT stands for any positive integer, e.g. **5**
\w{COUNT}	Any character string (A-Z, a-z, 0-9, underscore "_") with ANZAHL characters. ANZAHL stands for any positive integer, e.g. **5**
\D{COUNT}	Any character string (A-Z, a-z, special characters, umlauts, spaces) with COUNT characters. Numeric not allowed
\W	Single special character. (A-Z, a-z) or numeric (0-9) not allowed
STRING	STRING stands for a fixed character string specified by the user, e.g. **Project**, **Department_A**, **PID**
^STRING$	Expressions placed between **^** and **$** must not be empty and must be of the defined length. The only permissible input in this example is STRING. Without **^** and **$**, **STRING1234** or an empty text is also a valid input.

Sample formats:

Format	Examples
.._\d{4}	right: **Ab_1234**, **?!_0000** wrong: **12-1234**, **ab-abcd**
SAMPLE...	right: **SAMPLE1234**, **SAMPLEABCD**, **SAMPLEab12**, **SAMPLE** wrong: **SAPMLE1234**, **1234SAMPLE**
\w{2}-\d{2}	right: **ab-12**, **AB-12**, **01-12**, **a1-99** wrong: **12-ab**, **öö-12**, **??-12**
\W{2}SEPERATOR\D{2}	right: **!!SEPERATOR12**, **12SEPERATOR12**, **abSEPERATOR!?** wrong: **!!TRENNab**, **12SEPERATORab**, **abSEPERATOR12**

INLOOX OPTIONS: STATES

The options page **States** defines the different stages of development and completion a project can be in. A wide range of statuses can be defined coupled with a percentage to show the **state of progress** of the project. The project status is available for use on the **Management** page of every InLoox project.

⚠️Please note the possible **effects** when changing and deleting project statuses. These are described in this chapter.
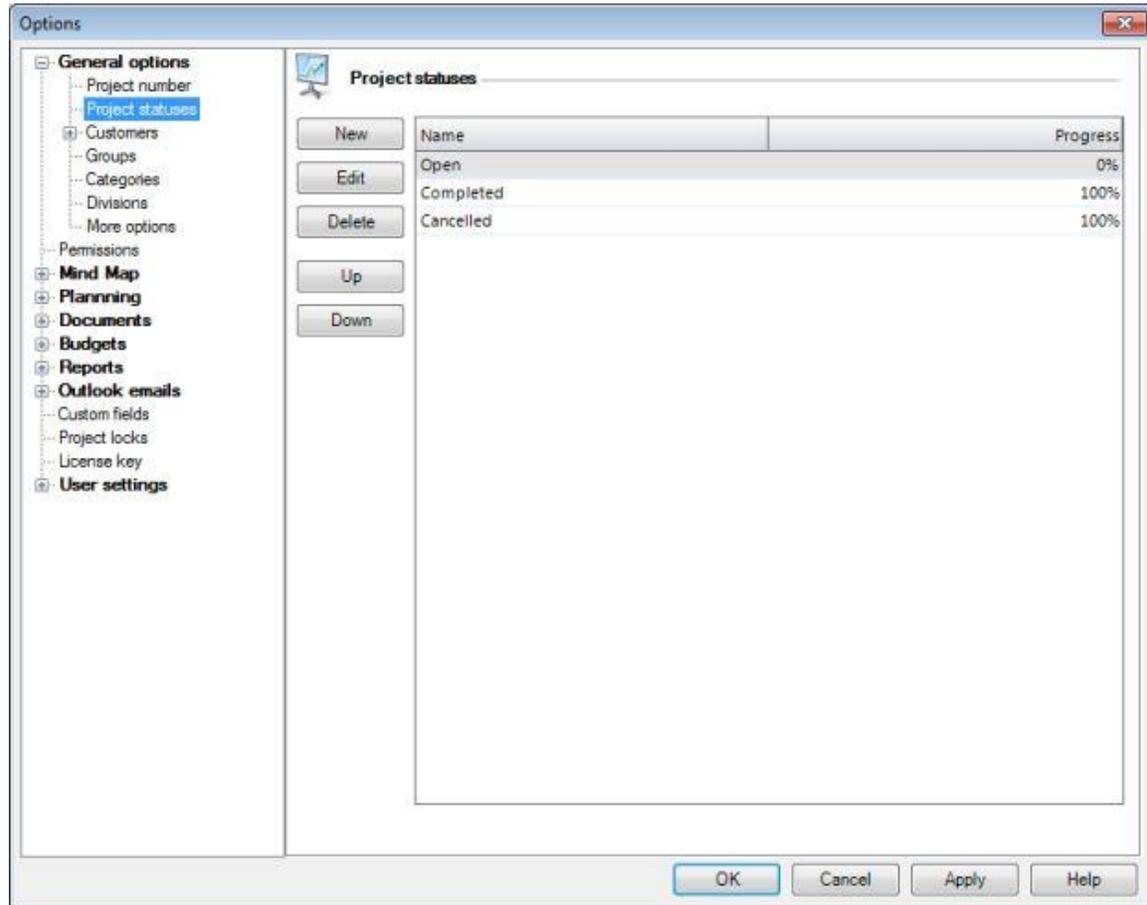
Detailed description of the **Project Statuses** page:

1. **New**: create a new project status

   - Input a **Name** and degree of **Progress (in %)**

   - The progress is a percentage figure, i.e. an integer between **0** and **100**

2. **Edit**: changes the selected status

3. **Delete**: removes the selected status

4. **Up**: moves the selected status towards the top of the list

5. **Down**: moves the selected status towards the bottom of the list

6. **Project Statuses list**: contains the name and progress of each state. The sequence of this list corresponds to the sequence displayed in the **projects**. Double click on an entry which is to be changed.

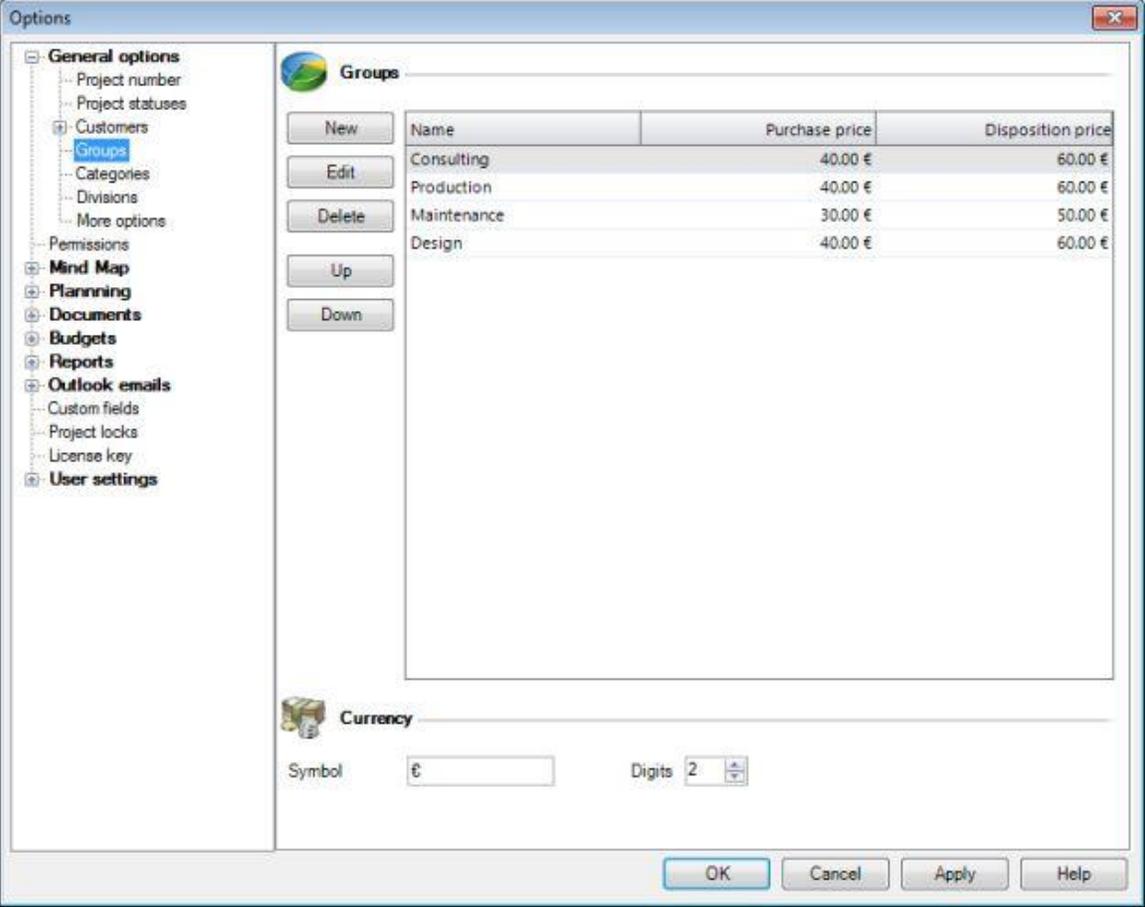Effects of changing or deleting **Project Statuses**:

- Adding a new state has no effect on existing projects.

- Changing the sequence of states has no effect on existing projects.

- Changes to the state (e.g. **Name**, **Progress in %**) take immediate effect in all relevant projects.

- **Deleting** a state causes all projects using it to remain without state until the user makes a **manual correction**.

INLOOX OPTIONS: GROUPS

The options page **Groups** defines the groups which can be used in each InLoox project on the **Planning**, **Time Tracking**, **Budget** and **Budget Overview** pages. The groups help structure the data more meaningfully allow ongoing automatic comparison between time tracking entries, planning elements and budgets positions. They can also carry a **currency code**.

⚠️Please note the possible **effects** when changing settings. These are described in this chapter.

ℹ️Purchase and selling prices are used on the **Budget** page, for example to prepare time tracking entries recorded on the **Time Tracking** page for billing.

Detailed description of the **Groups** page:

1. **New**: creates a new group

2.

   - Specify a **Name** and a **Purchase** and **Selling price**.

   - The currency can be defined in the **Currency** area

3. **Edit**: changes the selected group

4. **Delete**: removes the selected group

5. **Up**: moves the selected group towards the top of the list

6. **Down**: moves the selected group towards the bottom of the list

7. **Group List**: the sequence of this list corresponds to the sequence displayed in the **projects**. Double click on an entry which is to be changed

8. **Currency**: system wide definition of the currency **Symbol**, e.g. **€**, **$**, **CHF** or **£**

9. **Digits**: system wide definition of the number of decimal places (for non-integral amounts)

Effects of changing or deleting **Groups**:

- Adding and renaming groups has no effect on existing projects

- When group prices are changed the old amounts at first remain unchanged in all projects.
  The amounts are updated when the relevant planning element, time tracking entry or budget position is **next edited**.

- Deletion of groups has a **permanent** effect, namely that

  - the group and associated amounts are no longer displayed in the budget overview.

  - for all planning elements, time tracking entries and budget positions using the deleted groups must be assigned a new group **when next edited**.

Effect of changing a **currency symbol**:

- The currency is not automatically redenominated. If, for example, **€** is replaced by **$**, InLoox does not recalculate the amounts, but simply changes the currency symbol as if the rate of exchange were 1:1.

INLOOX OPTIONS: GENERAL OPTIONS: CATEGORIES

To Outlook 2003/2007 View

Outlook 2010 View

InLoox uses for its projects its own list of categories, which is separate from that of Outlook. When working networked with InLoox **Workgroup** or **Enterprise Edition** this list provides two significant advantages over the normal Outlook categories list:

- The category list is constant across all workstations. This saves manual reconciliation effort between individual workstations

- The list can only be maintained by the InLoox administrator, which ensures that only standard categories are available

Brief instruction:

1. Click on the tab **File**

2. Click on **Options** in the navigation pane

3. Select the node **General options >> Categories**

4. Carry out the required changes (**New**, **Edit**, **Delete**)

5. Click on **Apply**

Effects of editing or deleting a category:

- The **renaming** of a category takes immediate effect in all relevant projects

- The **deletion** of a category takes immediate effect in all relevant projects

To Outlook 2010 View

Outlook 2003/2007 View

InLoox uses for its projects its own list of categories, which is separate from that of Outlook. When working networked with InLoox **Workgroup** or **Enterprise Edition** this list provides two significant advantages over the normal Outlook categories list:

- The category list is constant across all workstations. This saves manual reconciliation effort between individual workstations.

- The list can only be maintained by the InLoox administrator, which ensures that only standard categories are available.

Brief instruction:

1. Click on the menu item **Options...** under the menu **Tools** in the **InLoox Toolbar**

2. Select the node **General options >> Categories**

3. Carry out the required changes (**New**, **Edit**, **Delete**)

4. Click on **Apply**
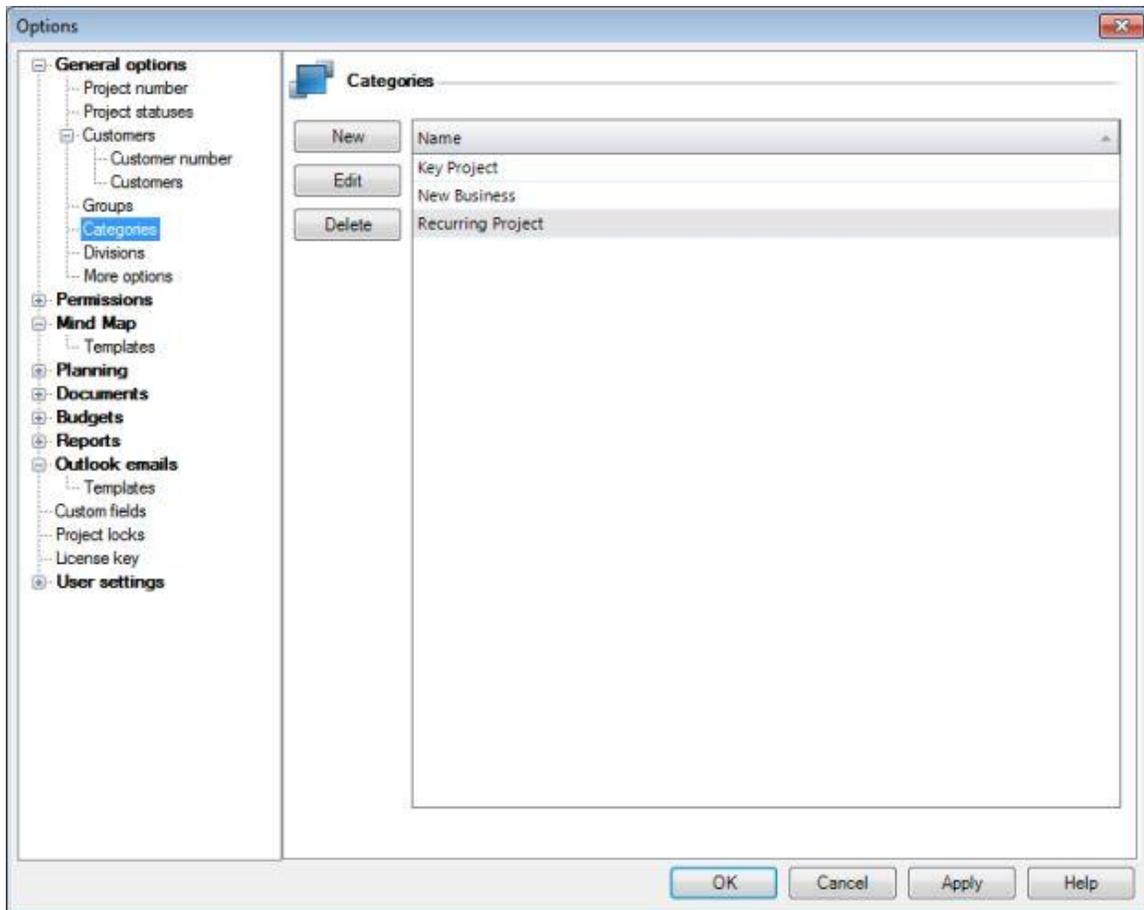
⚠️**Effects** of editing or deleting a category:

- The **renaming** of a category takes immediate effect in all relevant projects.

- The **deletion** of a category takes immediate effect in all relevant projects.

Permissions

INLOOX OPTIONS: PERMISSIONS

The options page **Permissions** is used to restrict the views and features available to specific users under InLoox **Workgroup** and **Enterprise Edition**.

Note: InLoox is delivered without permissions. Thus **every user** can see and change all permissions. This is a security risk.
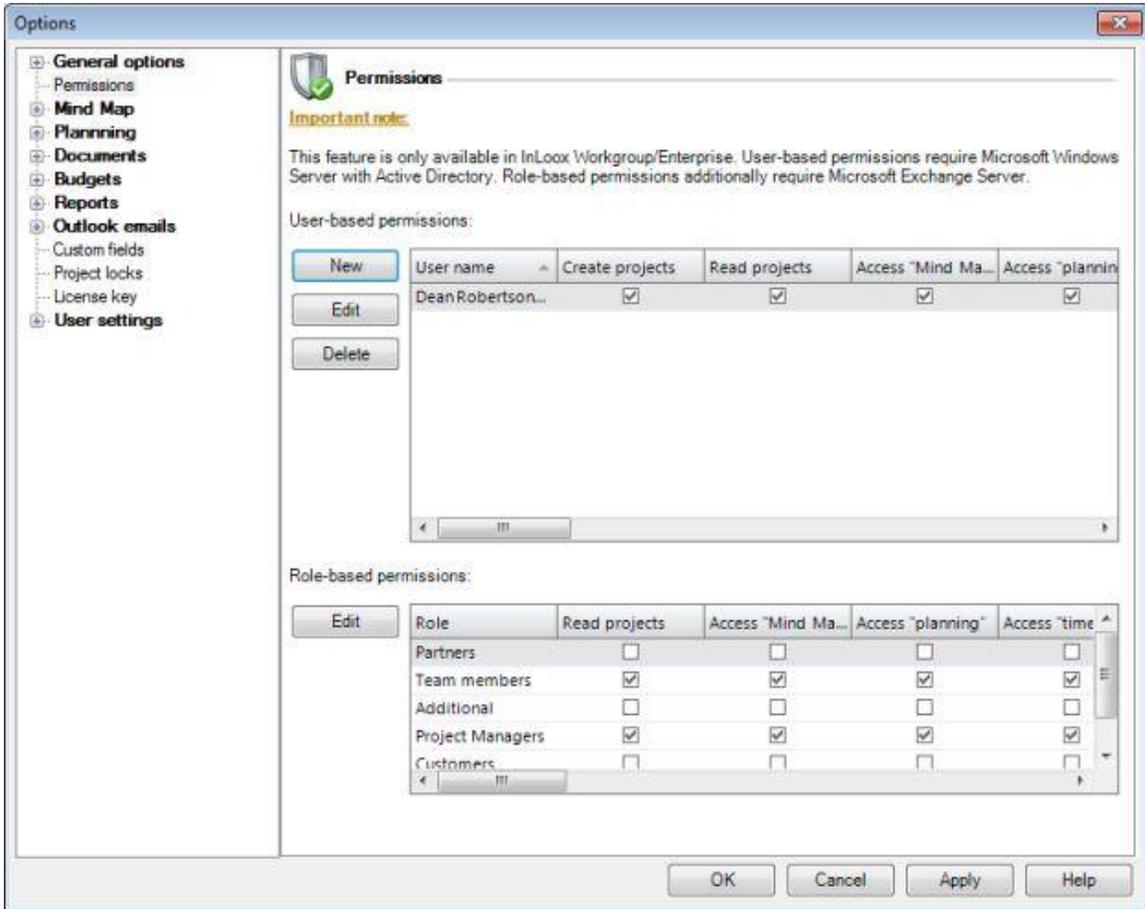
Permissions are either **role-based** or **user-based**:

Permission Mode	Remarks
User-based permissions	• Permissions based on **Windows user accounts**. **Active directory accounts** (in domain mode) and **local Windows user accounts** (in workgroup mode) are supported.
	• Apply **across all projects** and to the **entire database**
	• **Note:** InLoox does **not** support Windows groups at this time

Role-based permissions

- Users acquire permissions through **membership of a role in the project**. Project members are all persons who are listed in the project as **"In Charge"**

- Possible roles: **Project manager, Team member, Customer, Partner, Other**

- **Microsoft Exchange Server** is required

- **Note:** Persons are identified by their **Windows Security Identifier**, or SID, and their **X400 address**, or Exchange address. **Persons with the same X400 address have the same role-based permissions under InLoox.** If this is not so desired, please deactivate the role-based permissions entirely by removing all permissions for all roles.

Important note:

InLoox **combines** role-based and user-based permissions. The permission records of both modes are added. The example below illustrates a common configuration

- The role "**team**" may "**read projects**"and "**read budgets**".
  All other roles are ignored for the sake of clarity.

- The user account "**John Smith**" is authorized to "**edit projects** " and "**edit budgets**" (A List of InLoox Permissions can be found here.)

- "**John Smith**" is part of the "**team**" in the project "**Product Development**"

- There are three other projects in which "John Smith " is not involved and therefore does **not** have the role "team"

In result, these permissions apply to John Smith:

- He may read and edit the project "**Product Development**". He may also read and edit budgets in this project. John Smith has these permissions **in all projects** in which he is in the **team** role.

- "John Smith" cannot see any projects in which he is not a team member. He does not have the permission to "read projects", which is a prerequisite for all other permissions. Thus John Smith has no permissions for any other projects.

The following applies to all other team members involved in the project "**Product Development**":

- They may read the project "**Product Development**" and read but not edit budgets. They do not have the permission record of the account "John Smith"

- Persons who are team members in other projects than "**Product Development**" can see, in contrast to John Smith, a number of projects but may not edit any of them.

InLoox permissions are extremely flexible and allow a wide variety of scenarios to be covered without high administration effort. If you have questions on the assignment of permissions, we will be pleased to help.

Detailed description of the **user-based Permissions** area:

1. **New**: creates a new user permission.
   *The dialog box **Permissions** is displayed.*

   - Click on the button "**...**"

   - Select an **account** in the dialog box **Select user**. Either **Active Directory Accounts** or **Local Windows Accounts** can be selected.

   - To select an **Active Directory Account** click on the button **Paths**. In the dialog box **Path**, select in the node **Entire Network**

- Input the required user name into the field: **Input the object name to be used**

- Click on **Check name**. A user name that has been recognized by Windows is shown **underlined**

- Click on **Advanced...** if you need to search for a user name.

- Click on **OK**

- Select the **Permissions** for the user. A List of InLoox Permissions can be found here.

- Click on **OK**

2. **Edit**: changes the selected user permission

3. **Delete**: removes the selected user permission

Detailed description of the **Role-based Permissions** area:

Note: Role-based permissions are only active when at least one user-based administrator permission exists.

1. **Edit**: changes the selected role-based permission
   The dialog box **Permissions** *is displayed.*

   - Select the **Permissions** for the role. A List of InLoox Permissions can be found here.

   - Click on **OK**

LIST OF INLOOX PERMISSIONS

The following permissions apply under InLoox **Workgroup** and **Enterprise Edition**. Users or roles can be assigned permission for the actions listed.

Description	Permission	Restriction or Prerequisite
Create projects	User has the right to create new projects	Only available with user-based permissions
Read projects	- Project visible in the InLoox Project Overview - Project can be opened - Project can be exported if the "right to use existing reports" is granted	none
Access "Mind Maps"	Right to read all Mind Maps of a project (see **Mind Maps** page)	Prerequisite: Read projects
Access "planning"	Right to read all planning elements of a project (see **Planning** page)	Prerequisite: Read projects
Access "time tracking"	Right to read all time tracking entries of a project (see **Time Tracking** page)	Prerequisite: Read projects
Access own "time tracking" entries	Right to read all own time tracking entries of a project (see **Time Tracking** page)	Prerequisite: Read projects
Access "documents"	Right to open and read all documents of a project (see **Document** page)	Prerequisite: Read projects
Access "budgets"	Right to read all budgets, budget positions and the budget overview of a project (see **Budget** page; **Budget Overview** page)	Prerequisite: Read projects
Edit projects	Project can be changed. This right is a prerequisite for all actions which allow modifying data.	Prerequisite: Read projects
Edit "management"	Right to change project master data on **Management** page (except project contacts)	Prerequisite: Edit projects
Edit project contacts	Project contacts can be added, changed or deleted. It is thus possible for the user to control the roles of persons in a project (see **Management** page **In charge** area)	Prerequisites: - Edit projects - Edit "Management"
Lock projects	Project can be locked for other users (see "Mode" feature on the **Management** page). User without permission may not edit locked projects and cannot remove the lock	Prerequisites: - Edit projects - Edit "Management"

Edit "Mind Maps"	Allows adding, changing and deletion of all Mind Maps of a project (see **Mind Maps** page)	Prerequisite: Edit projects
Edit "planning"	Allows adding, changing and deletion of all planning elements of a project (see **Planning** page)	Prerequisite: Edit projects
Edit "time tracking"	Allows adding, changing and deletion of all time tracking entries of a project (see **Time Tracking** page)	Prerequisite: Edit projects
Edit own "time tracking" entries	Allows adding, changing and deletion of all time tracking (see **Time Tracking** page)	Prerequisite: Edit projects
Edit own "time tracking" entries	Allows adding, changing and deletion of **own** time tracking entries of a project (see **Time Tracking** page)	Prerequisite: Edit projects
Edit "time tracking" without time limit	Allows adding, changing and deletion of **past** time tracking entries of a project (see **Time Tracking** page)	Prerequisite: Edit projects
Edit "document"	Allows adding, changing and deletion of all documents in the document list of a project (see **Document** page)	Prerequisite: Edit projects
Edit "budgets"	Allows adding, changing and deletion of all budgets and budget assets of a project (see **Budget** page)	Prerequisite: Edit projects
Delete projects	Project can be deleted	none
Use existing reports	All reports can be used. The InLoox report generator filters from the report all data that the user has no right to see (e.g. if no right to read budgets has been granted, no budget data will be included in the exported reports.)	none
Create and edit report templates	Allows the creation, changing and deletion of report templates (see menu command Edit Report Templates)	only available for user-based permissions
Administrator	Controls access to master data maintenance and administrator functions. These include the following menu commands in the **InLoox Ribbon Menu / Toolbar** and **Options**:	

- **Edit planning templates** (right to rename and delete InLoox planning templates)

- **Edit budget assets** (right to create, change and delete InLoox budget assets)

- **Edit budget state** (right to create, change and delete InLoox budget states)

- **Edit notifications** (right to change Notification templates)

- **Edit categories** (right to create, change and delete InLoox Categories)

- **Edit custom fields** (right to create, change and delete Custom fields)

- **Remove project locks** (right to remove Data record locks)

- **Recycle Projects** (right to restore or

permanently remove deleted projects)

- **Licenses** (right to add and delete InLoox License code)

- **Options** (right to change the <u>InLoox Options</u>. Incorporates the right to change permissions)

Planning

INLOOX OPTIONS: PLANNING: WORKING TIMES

The options page **Working times** permits the setting of a system wide work calendar. This is the basis for the billing of work hours and costs on the **Planning** page. It is possible to define *one* calendar for *all* resources. Overtime is not taken into account in the planning, which is based on the company's standard working day. This prevents the recording and controlling of resources from becoming too complex. Overtime can be recorded at any time on the **Time Tracking** page.
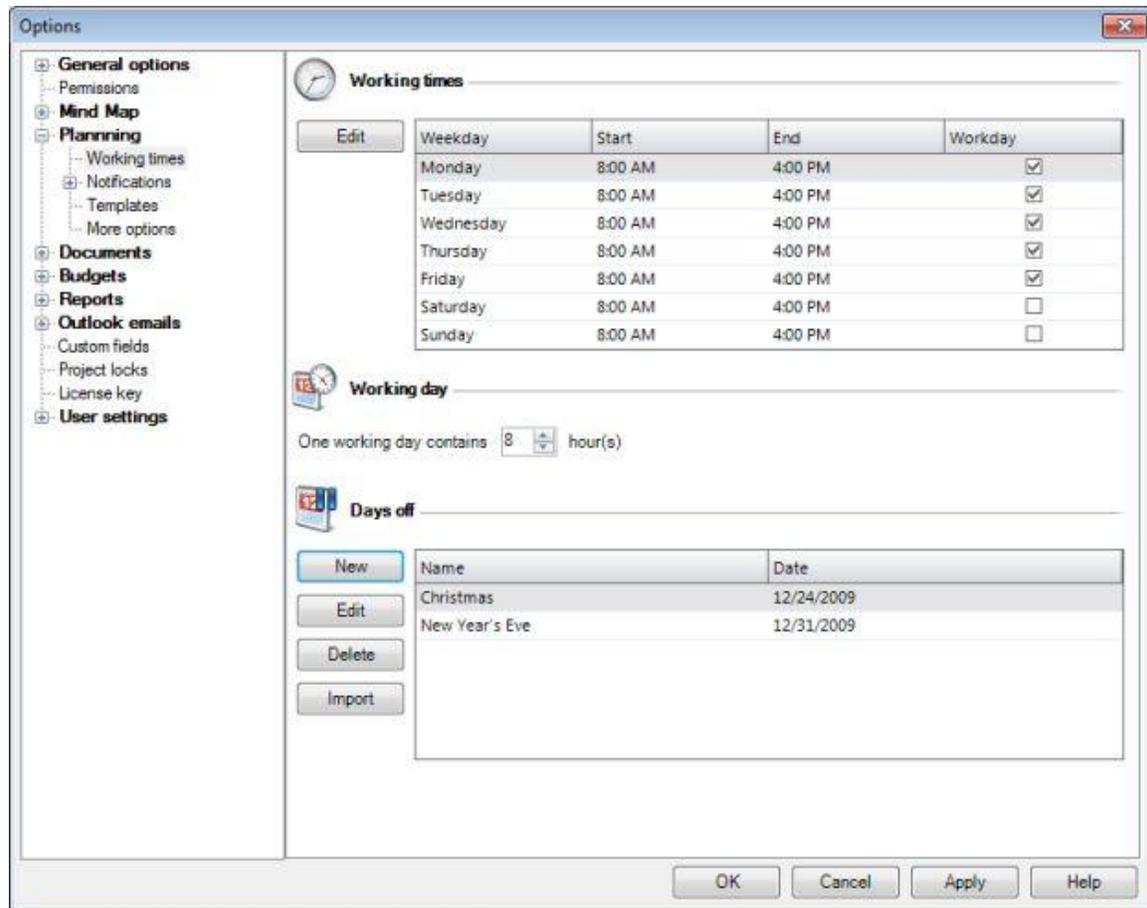
Detailed description of the **Working times** area:

1. **Edit**: changes the working times on the selected week day.
   *The dialog box **Edit Working Times** is displayed.*

   - Specify whether the day concerned is a **working day**. Non-working days are not included in the calculation. This determines which days are to be taken into account in the cost calculation on the **Planning** page.

   - Input **Work starts** and **Work ends** for the day

   - Click **OK**

Detailed description of the **Working day** area:

1. **One working day contains "X" hour(s)**:
   Defines the number of hours in a working day. This parameter helps the user in inputting time periods for **activities** and workloads for **work packages**

Detailed description of the **Days off** area:

1. **New**: creates a new single non-working day (e.g. holiday).
   The dialog box **New Non-Working Time** *is displayed.*

   - Input a **Name**

   - Select a **Date**. This day is not included in the calculation of working times on the **Planning** page.

   - Click **OK**

2. **Edit**: changes the selected day off entry

3. **Delete**: removes the selected day off entry

4. **Import**: loads a **Microsoft Office Outlook holidays file** (*.hol)

Note on billing of working time and costs:

- If **working times** are changed or **working days** are activated or deactivated, the internal costs of a project are only then changed when the relevant element is opened and the project saved.

- The billing of internal costs on the **Planning** page only takes account of the number of work hours of work packages in planning activities.

- The values specified here define the standard start and end for new planning elements. The use of working times facilitates the input of **activities** and **milestones**.

INLOOX OPTIONS: DAYS OFF

Choose **Tools >> Options >> Planning >> Working Times**. Here you can set the **length of a workday**, the **concrete working times as well as holidays and import .hol data.**
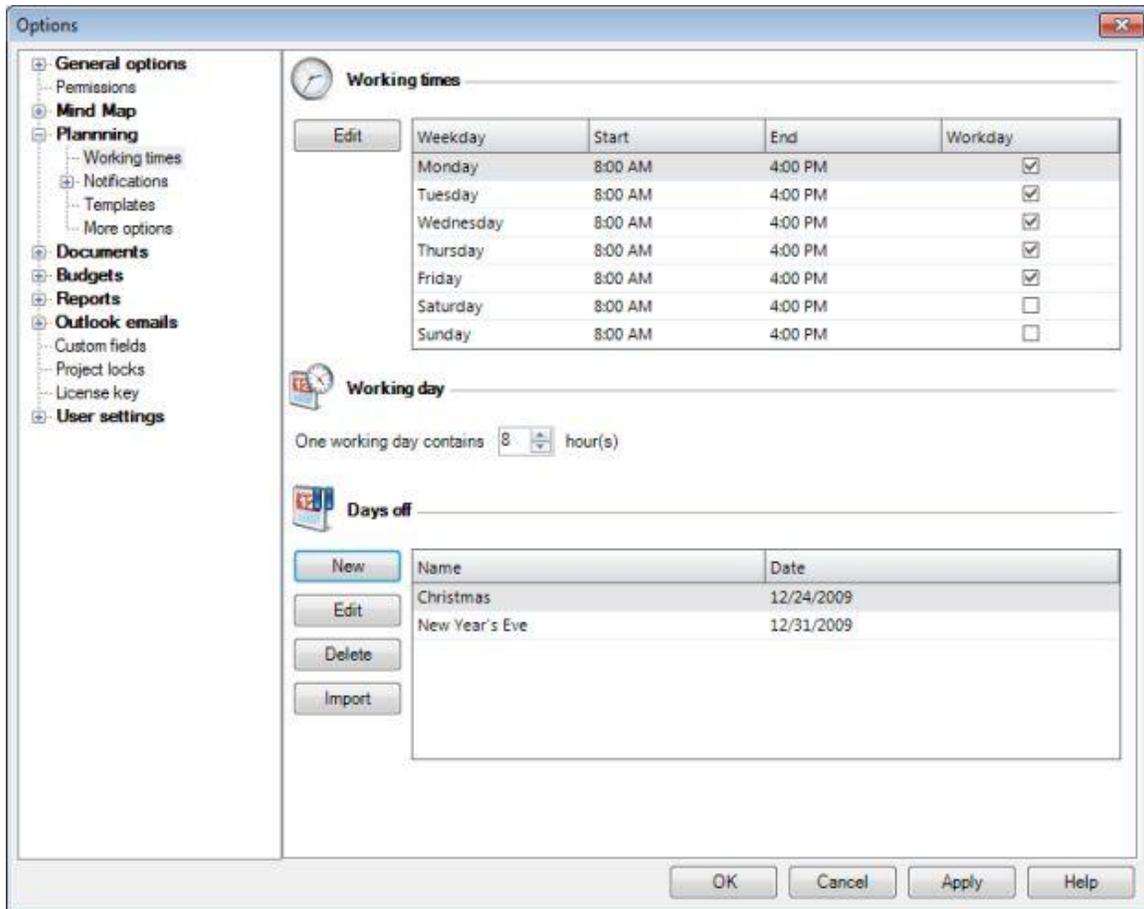
Proceed as follows:

1. Click on **New**
   The dialogue **Edit Non-Working Days** *is displayed*

2. **Label** the day

3. **Set the date** of the non-working day

4. Click on **OK**

5. The **holiday now is displayed** in the list

6. Click on **Apply**. **The non-working day now will be considered in all plannings**

Notifications

INLOOX OPTIONS: PLANNING: NOTIFICATIONS: TEMPLATES

To Outlook 2003/2007 View

Outlook 2010 View

Messages are for the communication of project plans and are sent to those **resources** of an InLoox project whom the **project planner** wishes should be informed automatically.

It is possible to define notifications if various kinds for each milestone, phase and grouping of a project using the **Planning** Page. Resources can receive information via **email**, **task request** or **InLoox reminder**. The message templates contain predefined text elements which can be changed or deleted.
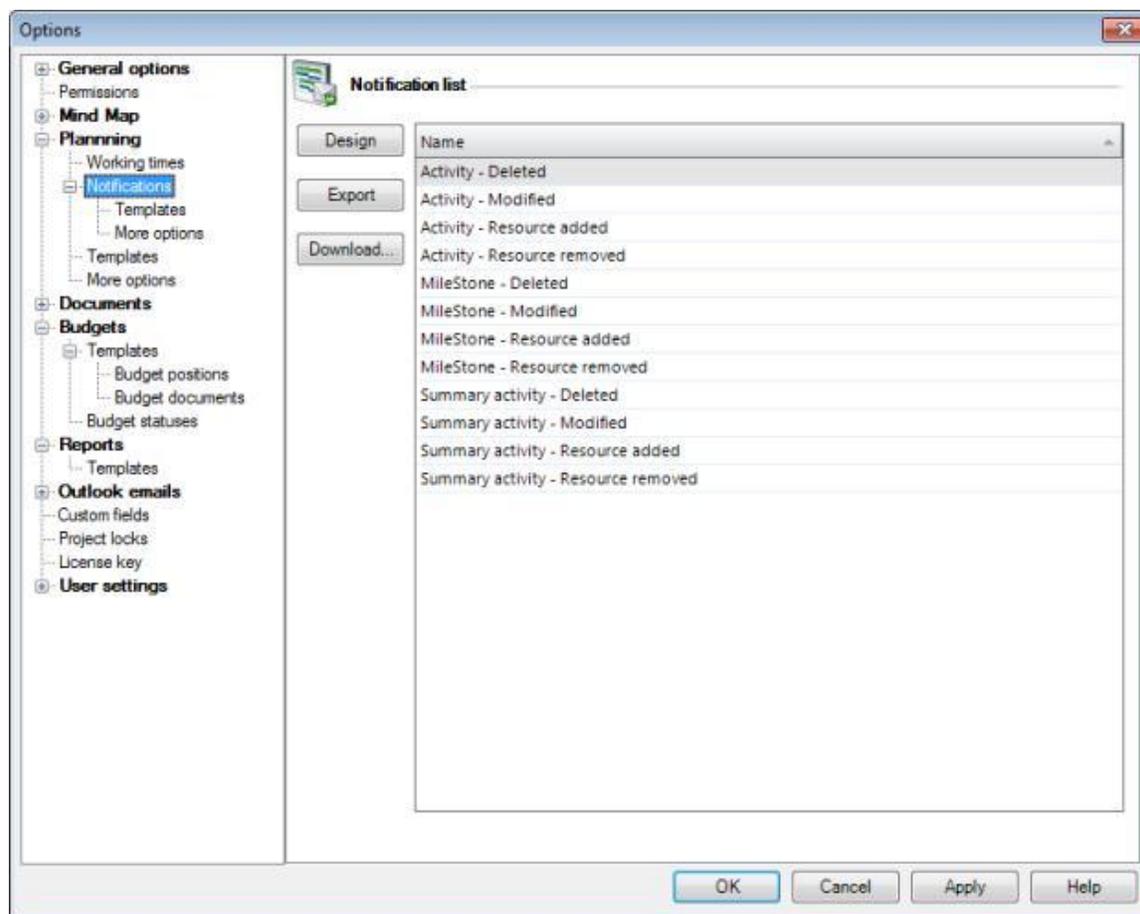
A brief instruction in changing texts for InLoox messages:

1. Click on the tab **File**

2. Click on **Options** in the navigation pane

3. Click on the menu point **Edit Notifications**
   The dialog box **Notifications** *is displayed*

4. Select an entry. e.g. **Activity - Resource added**

5. Click on **Design**
   The **InLoox Notification Designer** *is displayed:*
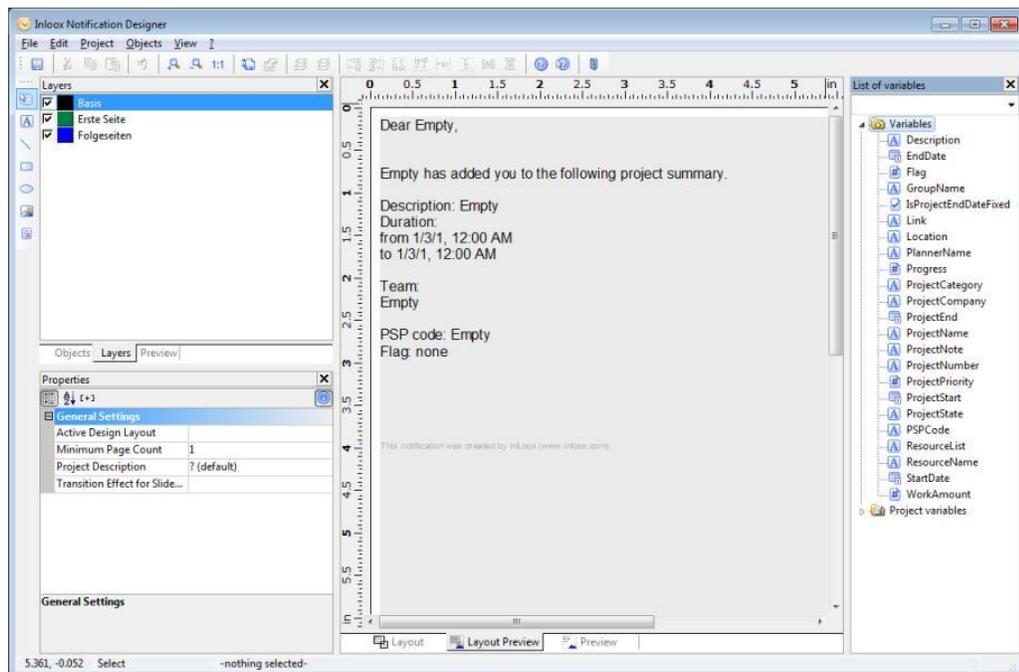
6. To change the text of the message:

   - **Change the text by double-clicking directly on it**, e.g. Yours faithfully, Muster Ltd

7. Click on **File > Save**

8. Click on **File > Close**

9. Click on **Apply**

Hints on changing messages

- A description of how to use the **InLoox Notification Designer** can be found in the chapter on Detailed Information: Reporting: The Designer

- A description of the **message types** can be found in the chapter on Detailed information: Configuration: Edit Notifications: Message Types

- More about the significance and contents of the **Fields (wild cards)** can be found in the chapter on Detailed Information: Configuration: Edit Notifications: Fields

To Outlook 2010 View

Outlook 2003/2007 View

Messages are for the communication of project plans and are sent to those **resources** of an InLoox project whom the **project planner** wishes should be informed automatically.

It is possible to define notifications if various kinds for each milestone, phase and grouping of a project using the **Planning** Page. Resources can receive information via **email**, **task request** or **InLoox reminder**. The message templates contain predefined text elements which can be changed or deleted.
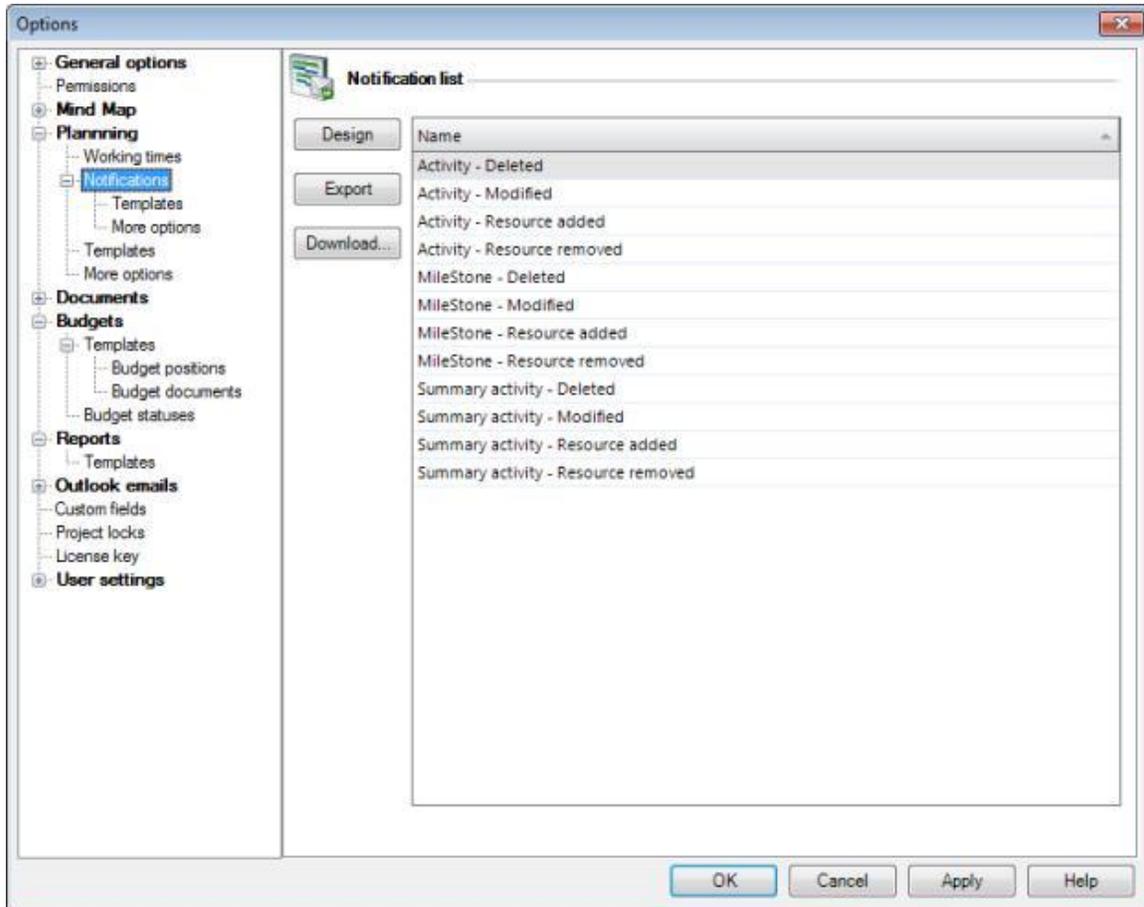
A brief instruction in changing texts for InLoox messages:

1. Click on the menu point **Edit Notifications...** under the menu **Tools** in the **InLoox Toolbar**
   The dialog box **Notifications** *is displayed*

2. Select an entry. e.g. **Activity - Resource added**

3. Click on **Design.**
    The **InLoox Notification Designer** is displayed:
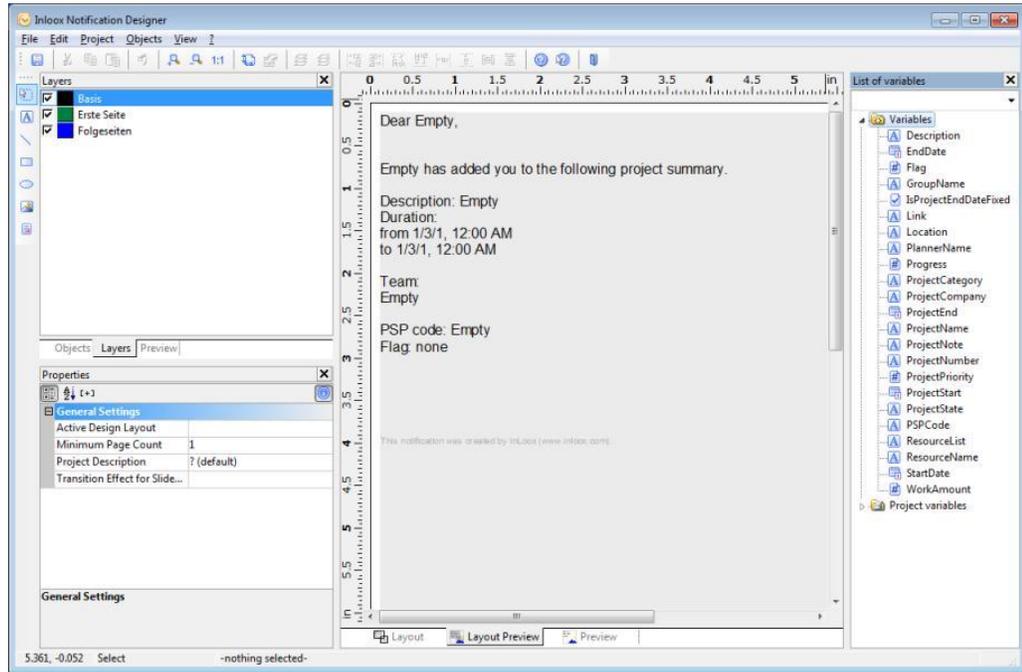
4.

•

5.

6.

7.

•

•

•   **Detailed Information: Configuration: Edit Notifications: Fields**

INLOOX OPTIONS: PLANNING: NOTIFICATIONS: MESSAGE TYPES

Messages are for the communication of project plans. Resources can receive information via **email**, **task request** or **meeting request**.

There are specific templates for the various types of planning elements and events which can be personalized.

The following message types are available:

Message name	Application
Activity - Modified	If an activity is changed using the dialog box **New Activity / Edit Activity** or directly or indirectly within the project plan, InLoox generates this message.
Activity - Resource added	If a resource is added to an activity using the dialog box **New Activity / Edit Activity**, InLoox generates this message.
Activity - Resource removed	If a resource is removed from an activity using the dialog box **New Activity / Edit Activity**, InLoox generates this message.
Activity - Deleted	If an activity is deleted from the project plan on the **Planning** Page, InLoox generates this message.
Milestone - Modified	If a milestone is changed using the dialog box **New Milestone / Edit Milestone** or directly or indirectly within the project plan on the **Planning** Page, InLoox generates this message.
Milestone - Resource added	If a resource is added to a milestone using the dialog box **New Milestone / Edit Milestone**, InLoox generates this message.
Milestone - Resource removed	If a resource is removed from a milestone using the dialog box **New Milestone / Edit Milestone**, InLoox generates this message.
Milestone - Deleted	If a milestone is deleted from the project plan on the **Planning** Page, InLoox generates this message.
Summary Activity - Modified	If a summary activity is changed using the dialog box **New Activity / Edit Summary Activity** or directly or indirectly within the project plan on the **Planning** Page, InLoox generates this message.
Summary Activity - Resource added	If a resource is added to a summary activity using the dialog box **New Activity / Edit Summary Activity**, InLoox generates this message.
Summary Activity - Resource removed	If a resource is removed from a summary activity using the dialog box **New Activity / Edit Summary Activity**, InLoox generates this message.
Summary Activity - Deleted	If a summary activity is deleted from the project plan on the **Planning** Page, InLoox generates this message.

INLOOX OPTIONS: PLANNING: NOTIFICATIONS: TEMPLATES: FIELDS

Messages are for the communication of project plans. The various **Message Types** are based on separate templates which the user can furnish with the necessary fields. A **Field** is a **wild card** for information from a project. Fields can be added to or deleted from a message template.

The following fields are available in the messages:

| Field name	Description	Contents
Description	Description	Multiple-line description of the planning element
EndDate	End planning element	End date of the planning element
Flag	Flag	Flag for the planning element (none, green, yellow, red)
GroupName	Group	Group to which the planning element belongs. The group is a sort criterion or a project cost center. Note: An internal price per hour is in file for each **group**. The internal prices and the available groups can be customized under **InLoox Options**
IsProjectEndDateFixed	Fixed deadline project	Specifies whether the project has a fixed completion deadline.
Link	Documents	Document paths (text-only) of the planning item
Location	Location	Free text field. States where the phase is to be carried out.
PlannerName	Name of planner	The name of the project planner, as stored in Outlook, e.g. **Max Planner**
Progress	% completed	Degree of completion of a planning element in percent. Numeric value between **0** and **100**
ProjectCategory	Project category	Category to which the project belongs
ProjectCompany	Project company	Free text field for the name of the customer in the project
ProjectEnd	Project end	End date of the project
ProjectName	Project name	Concise, freely definable description of the project. The project name can be used for more than one project.
ProjectNote	Project Note	Multiple-line free text for the concise recording and communication of the significant aspects of the project. The project note is input in Notes Area of the

Management Page.

ProjectNumber	Project number	Unique number identifying the project. The format of this number can be customized under **InLoox Options**
ProjectPriority	Project priority	Priority of the project
ProjectStart	Project start	Start date of the project
ProjectState	Project status	Text naming the status of the project
PSPCode	PSP code	PSP-Code = Work Breakdown Structure code. Free text field for identification of phases and milestones in large projects
ResourceName	Name of resource	The name of the resource or recipient of the message, as stored in Outlook, e.g. **Tom Masterresource**
ResourceList	Resources	List of all resources involved in a planning element, including email address, e.g. **Joe Maddison (joe.maddison@company.com) Jou-Ling Xi (jlx@mailaddress.com)**
StartDate	Start planning element	Start date of the planning element
WorkAmount	Amount of work	Amount of work done by the recipient resource for the planning element

INLOOX OPTIONS: PLANNING: TEMPLATES

To Outlook 2003/2007 View

Outlook 2010 View

Planning templates are used to speed the creation of new project plans and can be called in all **InLoox Projects** on the **Planning** Page. Templates contain predefined milestones, activities and summary activities, plus resource data.
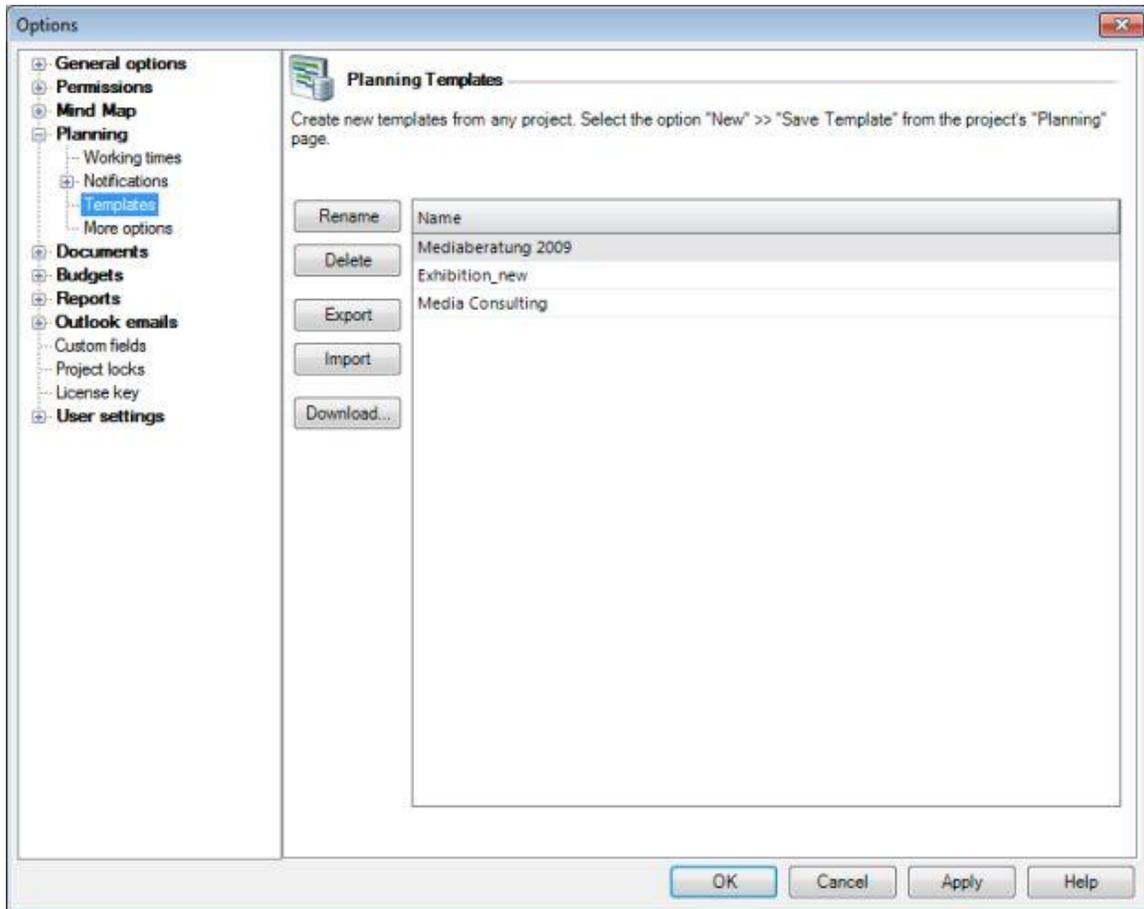
A brief instruction in renaming and deleting planning templates:

1. Click on the tab **File**

2. Click on **Options** in the navigation pane

3. Click on **Planning >> Templates**
   *The page **Planning templates** is displayed*

4. Click on **Rename**
   *The dialog box **Rename Planning Template** is displayed*

5. Specify a **New name** for the template

6.   Click on **Delete** to remove a template permanently
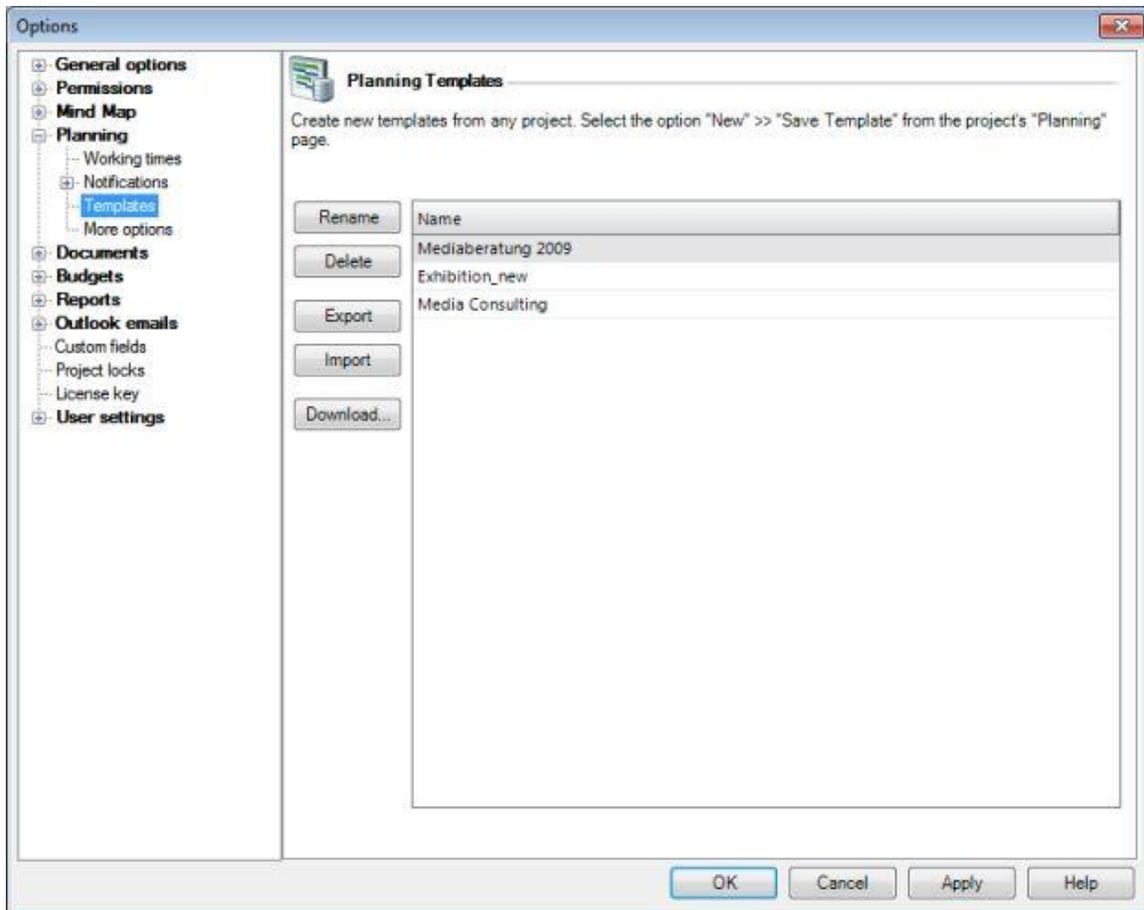
7.   Click on **Apply**

Hints for the creation of InLoox planning templates:

- Create templates directly from an InLoox project on the **Planning** Page

- Templates can be used to generate entire projects or **specific sections** of a project

- Templates can be exported or imported as files received from other users. Further planning templates can be found in the **Download area** of the **Support Center**, that can be reached by clicking the **Download** button

To Outlook 2010 View

Outlook 2003/2007 View

Planning templates are used to speed the creation of new project plans and can be called in all **InLoox Projects** on the **Planning** Page. Templates contain predefined milestones, activities and summary activities, plus resource data.

A brief instruction in renaming and deleting planning templates:

1. Click on the menu point **Planning >> Templates...** under the menu **Options...** in the **InLoox Toolbar**
   *The page **Planning templates** is displayed*

2. Click on **Rename**

3. *The dialog box **Rename Planning Template** is displayed.*

4. Specify a **New name** for the template.

5. Click on **Delete** to remove a template permanently.

6. Click on **Apply**

Hints for the creation of InLoox planning templates:

- Create templates directly from an InLoox project on the **Planning** Page

- Templates can be used to generate entire projects or **specific sections** of a project

- Templates can be exported or imported as files received from other users. Further planning templates can be found in the **Download area** of the **Support Center**, that can be reached by clicking the **Download** button

Documents

INLOOX OPTIONS: DOCUMENTS

The options page **Documents** defines the rules for the InLoox file archiving feature. There are several customizing options. The format of the project number affects the **Document** page. It is possible to update the contents of the project folder automatically.

⚠️Please note the possible **effects** when changing settings. These are described in this chapter.
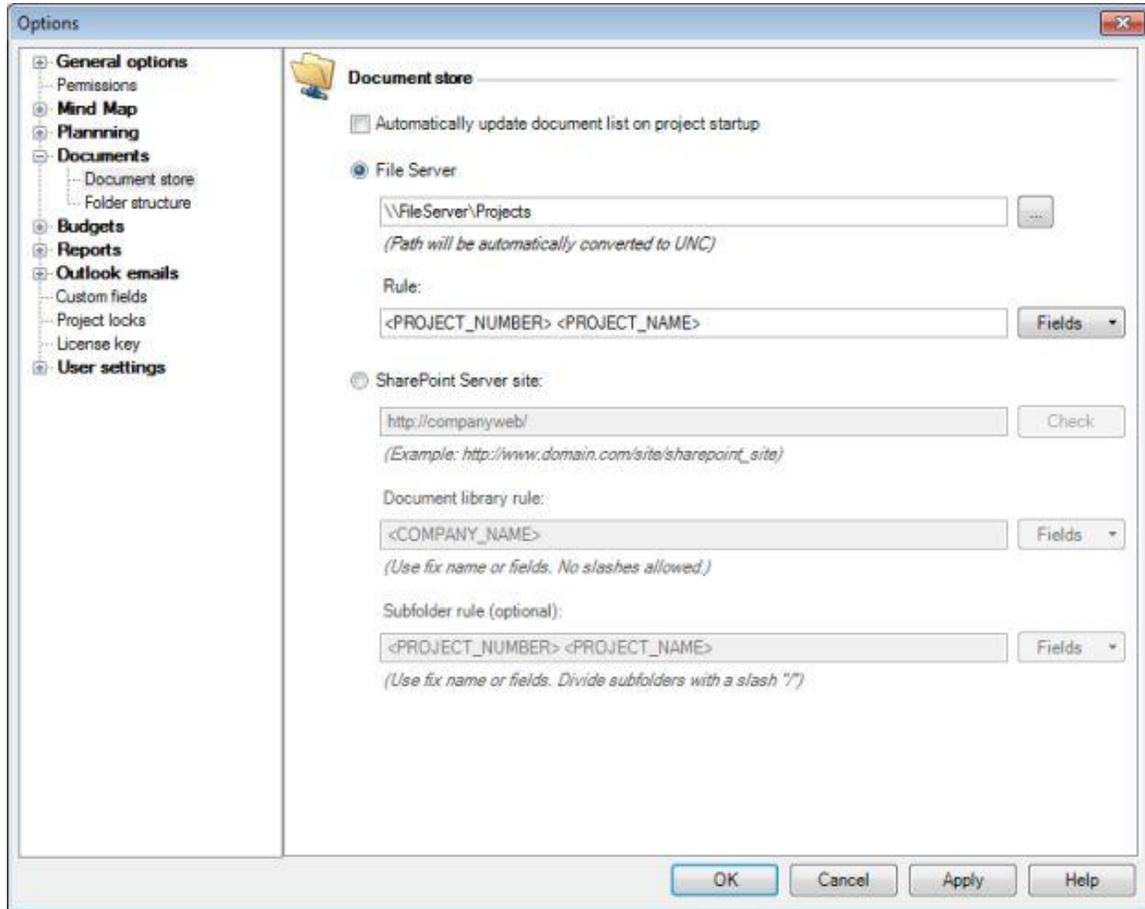
Detailed description of the options page **Documents**:

1. **Automatically update document list on project startup**: Documents are read anew when the project is loaded. This option slows down the opening of a project but ensures automatically that the **Documents** page always show up-to-date information.

2. **File Server**

    1. **Base path**: UNC resource, e.g. \\server1\projects or C:\Projects\

    2. **Rule**: Structure for individual projects. The following criteria can be combined as desired:

        - <PROJECT_NAME> (Project name on the **Management** page, "Project area")

- <PROJECT_NUMBER> (Project number on the **Management** page, "Project area")

- <COMPANY_NAME> (Customer name on the **Management** page, "Project area")

- <CURRENT_YEAR> (Current year, four digits)

- <DIVISION> (Division name on the **Management** page, "Project area")

The **Standard parameter** <COMPANY_NAME>\<PROJECT_NUMBER> <PROJECT_NAME> points automatically to the following folder structure:
<BASEPATH>\Customer1\2008-001 Project 1
<BASEPATH>\Customer1\2008-002 Project 2
<BASEPATH>\Customer2\2008-003 Project 1

3. **SharePoint Server site**

   1. **Base path**: Path to a SharePoint server site, e.g. http://companyweb/ or http://www.my-sharepoint.com/site_int/

   2. **Document library rule**: Structure for creating **SharePoint document libraries**. A fixed text may be input (which causes all projects to use the same library) or a rule (see file server rule, above). Creating a separate **SharePoint document library** for each project has the advantage that the data access permissions can also be defined separately.

   3. **Subfolder rule (optional)**: Path name within a **SharePoint document library**. If no text is input the master folder of the document library is assumed. If only one **SharePoint document library** is to be used, it is useful to apply a rule (see File Server, above), since otherwise the documents from all projects would be copied to the same folder.

Effects of changing **Storage type**, **Base path** or **Rules**:

- If no projects are yet on file, changing these parameters has no effect.

- **New Projects** or **projects for which no document folders exist** are managed automatically according to the changed parameters.

- **Existing projects** are managed with the existing document folder until the user changes this manually.

INLOOX OPTIONS: DOCUMENTS: FOLDER STRUCTURE

The options page **Document Folders** specifies subfolders created automatically when the InLoox file archiving facility is used. InLoox allows subfolders to be created automatically in each document folder of a project. These subfolders are created new as soon as a user selects a new project folder on the **Document** page. As many subfolders as required may be created automatically in a hierarchy structure of any depth.

⚠️Please note the possible **effects** when changing settings. These are described in this chapter.
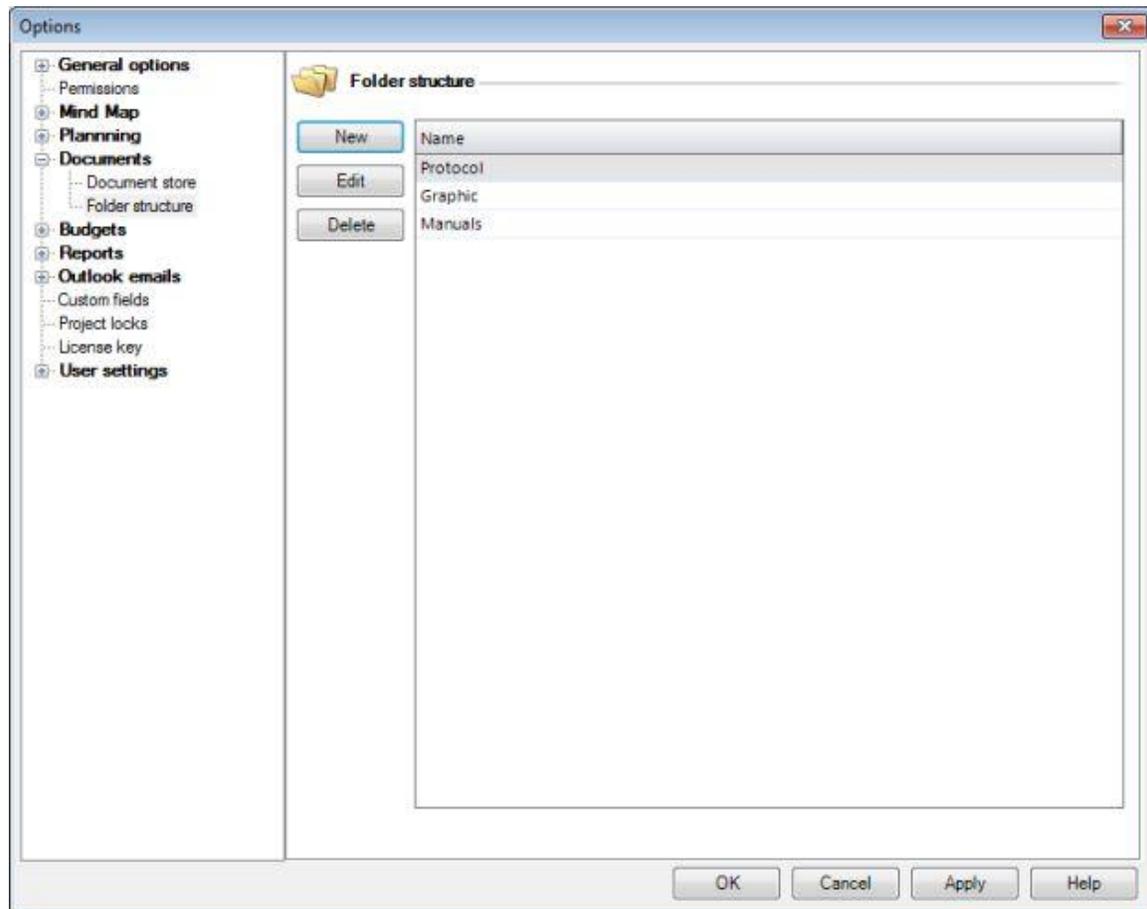
Detailed description of the **Folder Structure** area:

1. **New**: creates a new subfolder

    - Input for example **Basics\Plans**. InLoox creates in each project document folder a folder named **Basics**, which contains a subfolder named **Plans**.

    - Click on **OK**

2. **Edit**: changes the selected subfolder

3. **Delete**: removes the selected subfolder

⚠️**Effects** of changing **Base path** or **Rules**:

- Existing subfolders are **not deleted or renamed** when the subfolder configuration is changed.

- In existing projects, new structures only become effective when new documents are added.

Budgets

Templates

INLOOX OPTIONS: BUDGETS: TEMPLATES: BUDGET POSITIONS

To Outlook 2003/2007 View

Outlook 2010 View

The budget documents list contains the budget documents which can be called up by the users in all **InLoox Projects** on the **Budget** Page for the creation of new expenses and revenues. The list of budget positions can be edited or deleted as required.
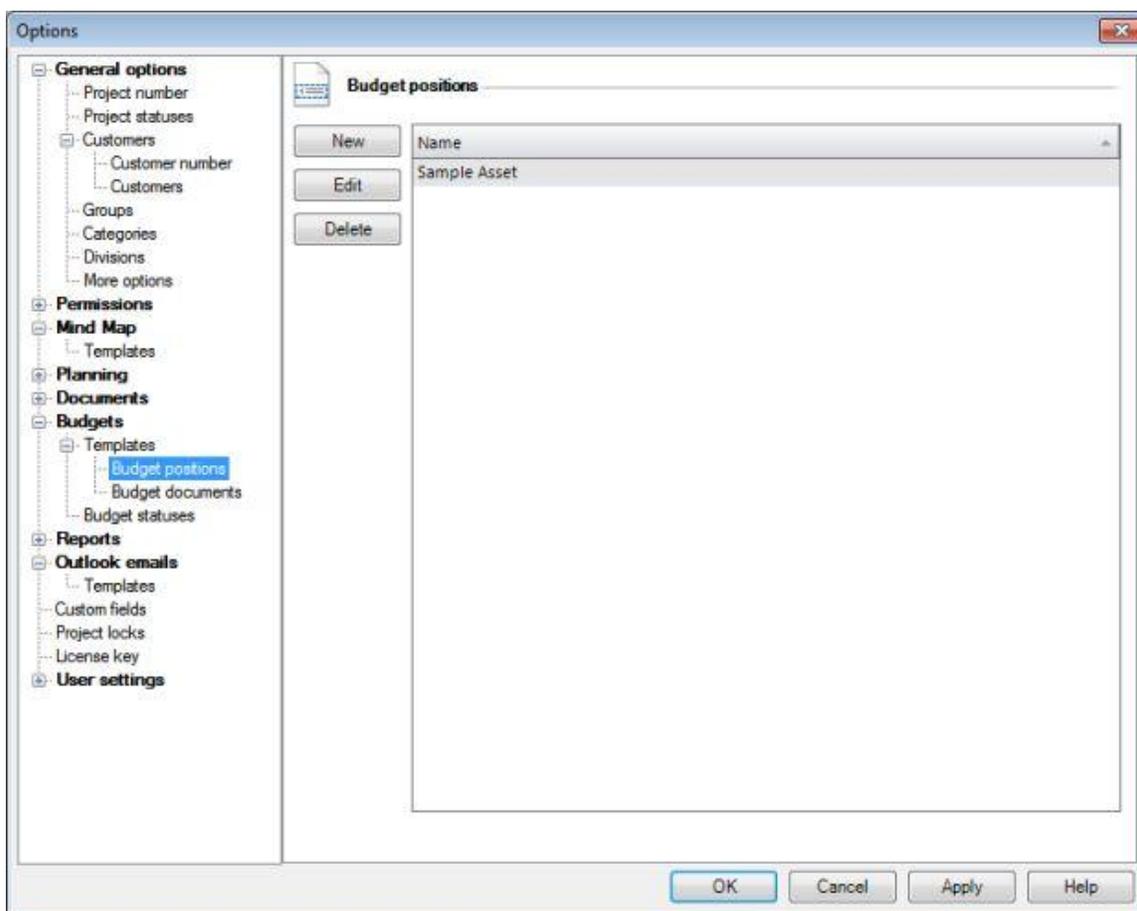
A brief summary of the creation of positions:

1. Click on the tab **File**

2. Click on **Options** in the navigation pane

3. Select the node **Budgets >> Templates >> Budget positions**
   The page **Budget positions** is displayed

4. Click on **New**
   *The dialog box **New Position** is displayed:*

5. Specify the **Name**, **Description** and **Quantity** (Standard is 1.0)

6. Click on **New** in the **Pricing** area.
   *The dialog box **New Unit** is displayed.*

7. Create at least one unit:

   - **Name**, e.g. **Day**, **Cubic meter**, **Flat rate**

   - **Purchase price**

   - **Selling price**

8. Select at least one **Group**

9. Click on **OK**

10. Click on **Apply**

💡 **Hints** for changing InLoox budget assets:

- The name of each asset should be short and unambiguous

- The description can include wildcard characters, e.g. **...size is x units...**

To Outlook 2010 View

Outlook 2003/2007 View

The budget documents list contains the budget documents which can be called up by the users in all **InLoox Projects** on the **Budget** Page for the creation of new expenses and revenues. The list of budget positions can be edited or deleted as required.
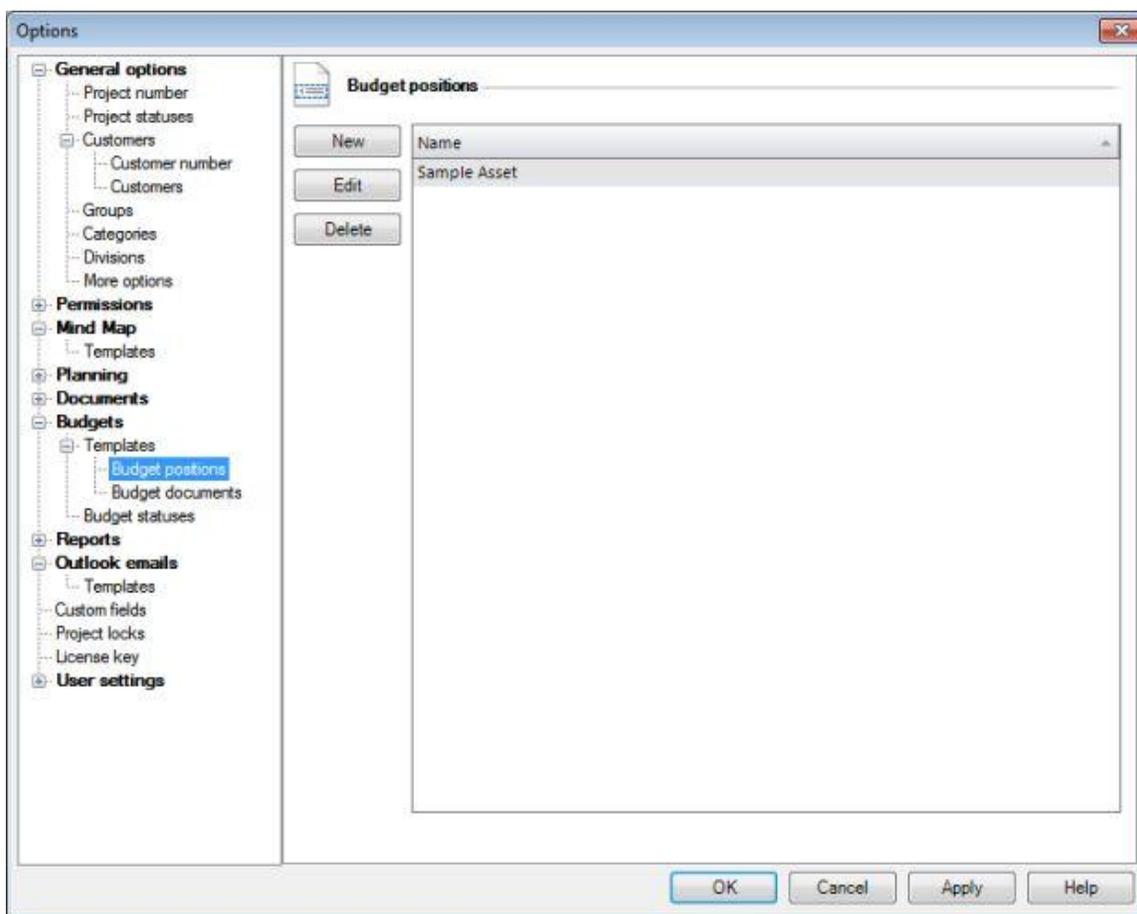
A brief summary of the creation of positions:

1. Click on the menu point **Options...** in the menu **Tools** in the **InLoox Toolbar**. Select the node **Budgets >> Templates >> Budget positions.**
   *The page **Budget positions** is displayed*

2. Click on **New**
   *The dialog box **New Position** is displayed:*

3. Specify the **Name**, **Description** and **Quantity** (Standard is 1.0)

4. Click on **New** in the **Pricing** area.
   *The dialog box **New Unit** is displayed.*

5. Create at least one unit:

   - **Name**, e.g. **Day**, **Cubic meter**, **Flat rate**

   - **Purchase price**

   - **Selling price**

6. Select at least one **Group**

7. Click on **OK**

8. Click on **Apply**

💡 **Hints** for changing InLoox budget assets:

- The name of each asset should be short and unambiguous.

- The description can include wildcard characters, e.g. **...size is x units...**

INLOOX OPTIONS: BUDGETS: BUDGET STATUSES

To Outlook 2003/2007 View

Outlook 2010 View

It is possible in the dialog box New Budget/Edit Budget under the budget page of a project to select a budget **State**. Predefined values of the budget state can be modified as follows:

Brief instruction

1. Click on the tab **File**

2. Click on **Options** in the navigation pane

3. Select the node **Budgets >> Budget statuses**

4. Carry out the desired changes (**New**, **Edit**, **Delete**)

5. Click on **Apply**

Effects of modifying or deleting a budget state:

-   The **renaming** of a state takes immediate effect in all relevant projects

-   On the **deletion** of a state the relevant budgets have no state until a new state is selected manually by the user and the budget saved.

To Outlook 2010 View

Outlook 2003/2007 View

It is possible in the dialog box New Budget/Edit Budget under the budget page of a project to select a budget **State**. Predefined values of the budget state can be modified as follows:

Brief instruction

1. Click on the menu point **Options...** in the menu **Tools** under the **InLoox Toolbar**

2. Select the node **Budgets >> Budget statuses**

3. Carry out the desired changes (**New**, **Edit**, **Delete**)

4. Click on **Apply**

Effects of modifying or deleting a budget state:

-   The **renaming** of a state takes immediate effect in all relevant projects

- On the **deletion** of a state the relevant budgets have no state until a new state is selected manually by the user and the budget saved.

Reports

INLOOX OPTIONS: REPORTS: CUSTOMIZE REPORT TEMPLATES

To Outlook 2003/2007 View

Outlook 2010 View

It is possible for any user with the relevant permission to export any project via the InLoox Toolbar.

⚠️A user requires read access to the **project data** to be exported plus permission for use of report templates. More information on this topic can be found in the chapter on **Permissions**.
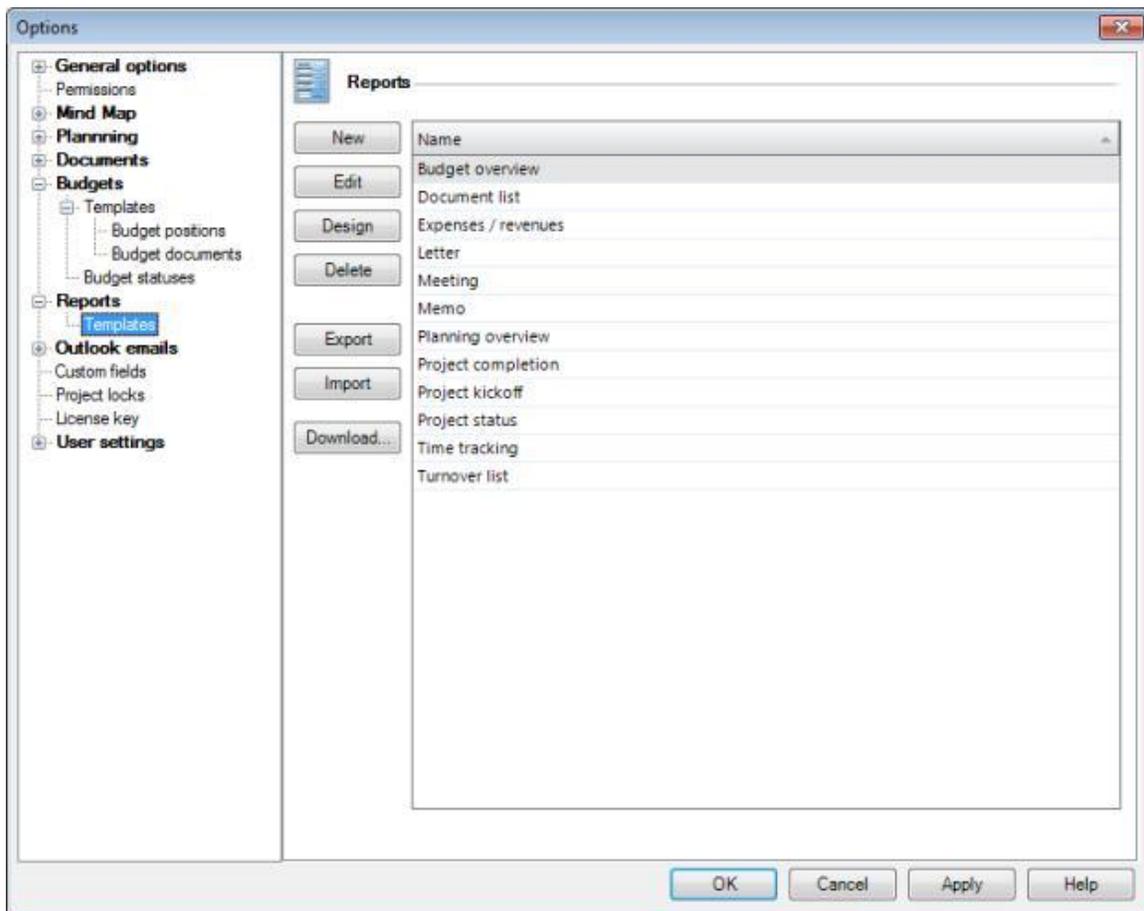
A brief summary of maintenance of report templates:

1. Click on the tab **File**

2. Click on **Options** in the navigation pane

3. Select **Reports** >> **Templates** in the navigation area to the left
   The **Reports** page is displayed

1. Select a template and click on **Edit**
   The dialog box **Report** *is displayed:*
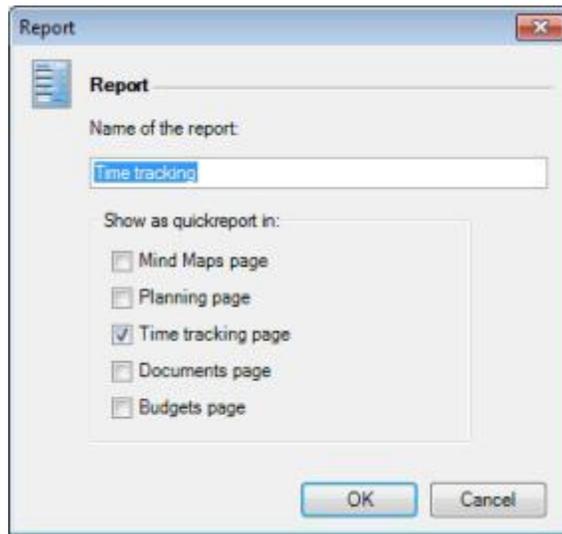
2. Change the name as required and select project pages in which the template is to be used as the standard template

3. Click on **OK**

4. Click on **Design**
   The dialog box **InLoox Report Designer** *is displayed:*
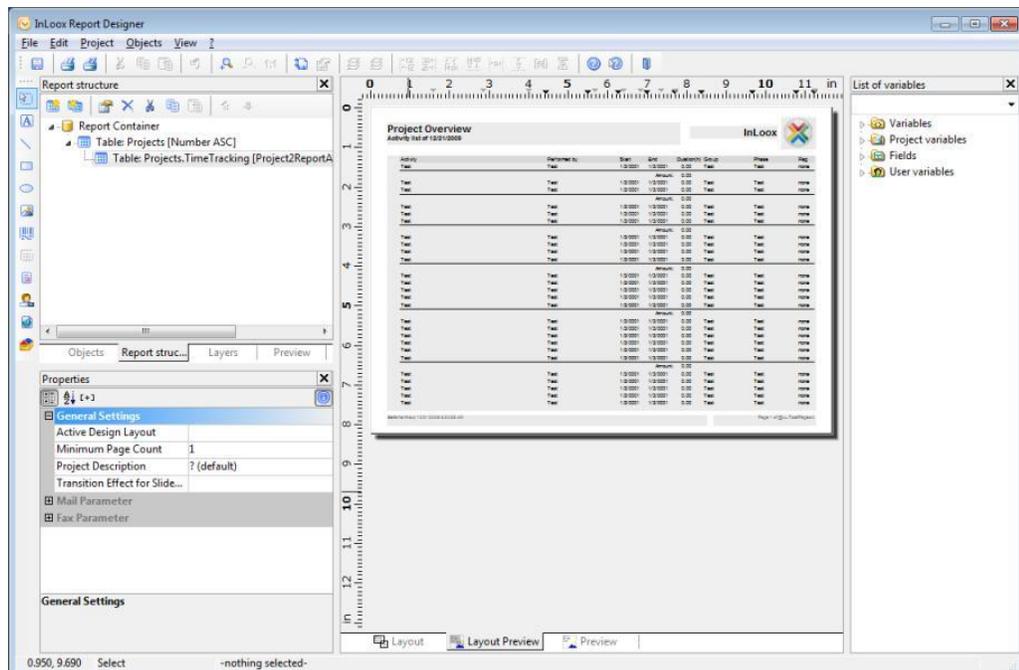
5. The following gives an example of how to add an additional data column to the **Time tracking** report. In **Report structure** area click on **Table: Projects.TimeTracking** under the **Table: Projects** (this is sorted numerically in the upper frame).
   The dialog box **Table Contents** *is displayed:*
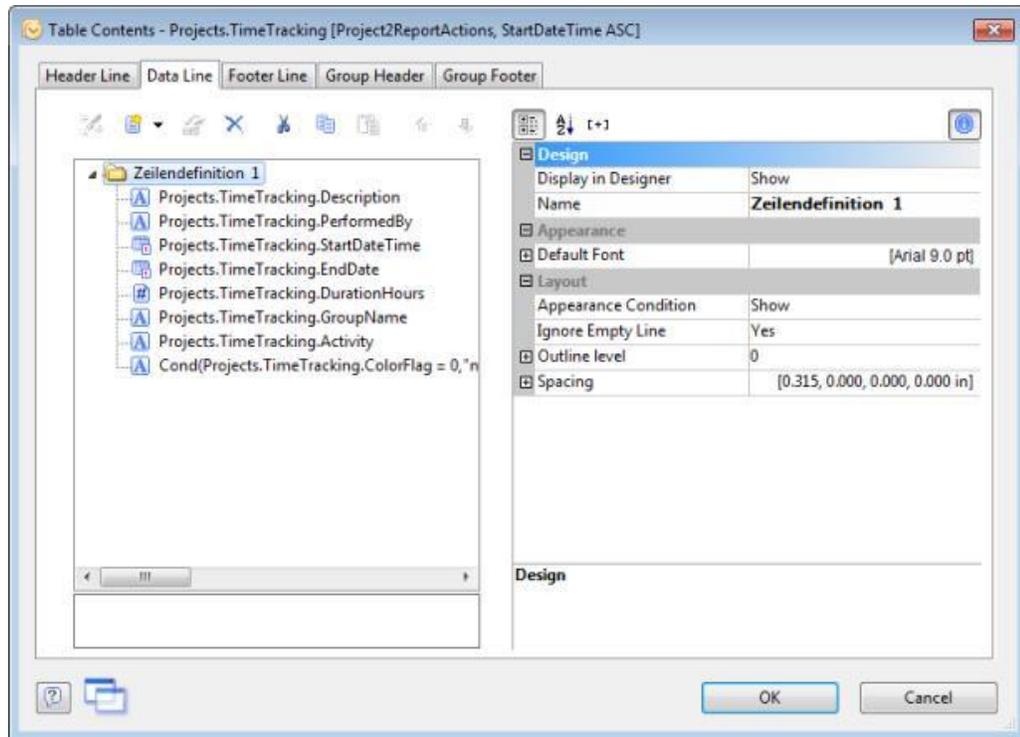
6. Click on the symbol 📄 **Insert column**
   *The dialog box **Edit Table** is displayed*:
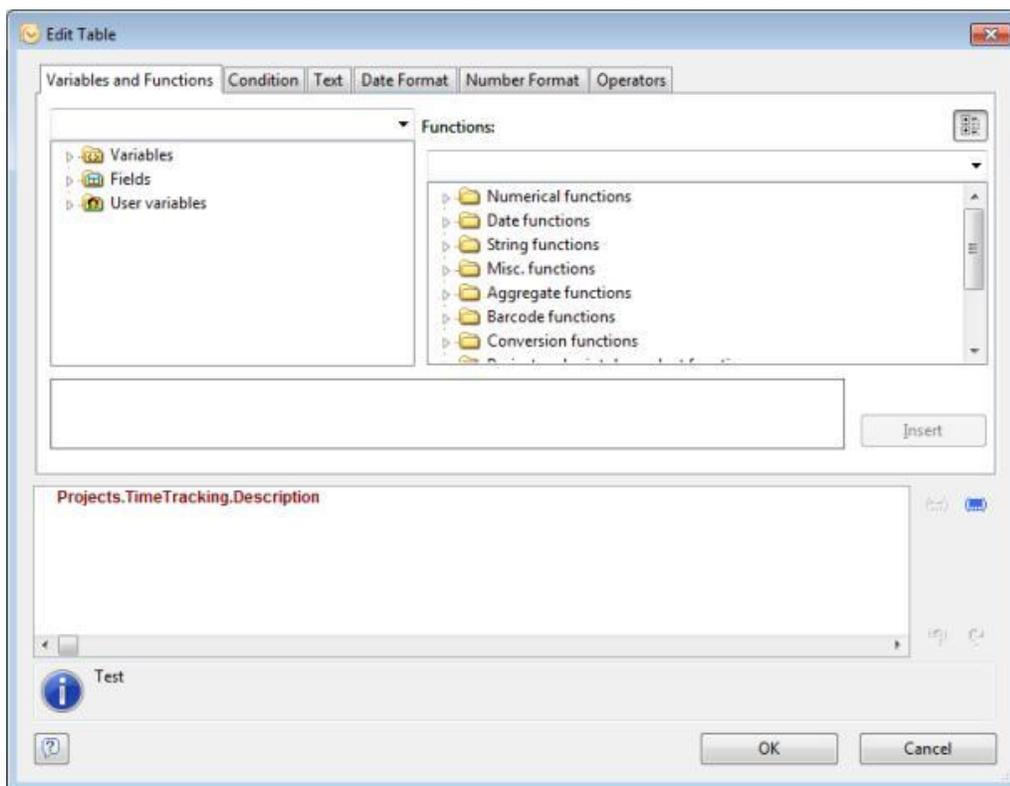
Select for example the field **ChangedBy** in the tree structure under **Fields >> Projects >> TimeTracking** and click on **Insert** and then on **OK**

7. Click on the tab **Header** and then on the **triangle** next to the symbol 📄, then select **Column**

8. Enter into the lower test field the text (including quotation marks): **"Changed by"**

9. Click on **OK**

10. Click again on **OK**

11. Click on **File >> Save**

12. Click on **File >> Close**

13. Click on **OK**

14. The template is now available system-wide in its modified form.

Notes

Details of the various **standard templates** can be found in the chapter on Types of Report Templates

A detailed instructions on the use of the InLoox Report Designer can be found in the chapter on Reporting: The Designer

Report templates can be exported or imported as files from other users. Further report templates can be found in **Download Area** of the **Support Center**

To Outlook 2010 View

Outlook 2003/2007 View

It is possible for any user with the relevant permission to export any project via the InLoox Toolbar.

⚠️ A user requires read access to the **project data** to be exported plus permission for use of report templates. More information on this topic can be found in the chapter on **Permissions**.
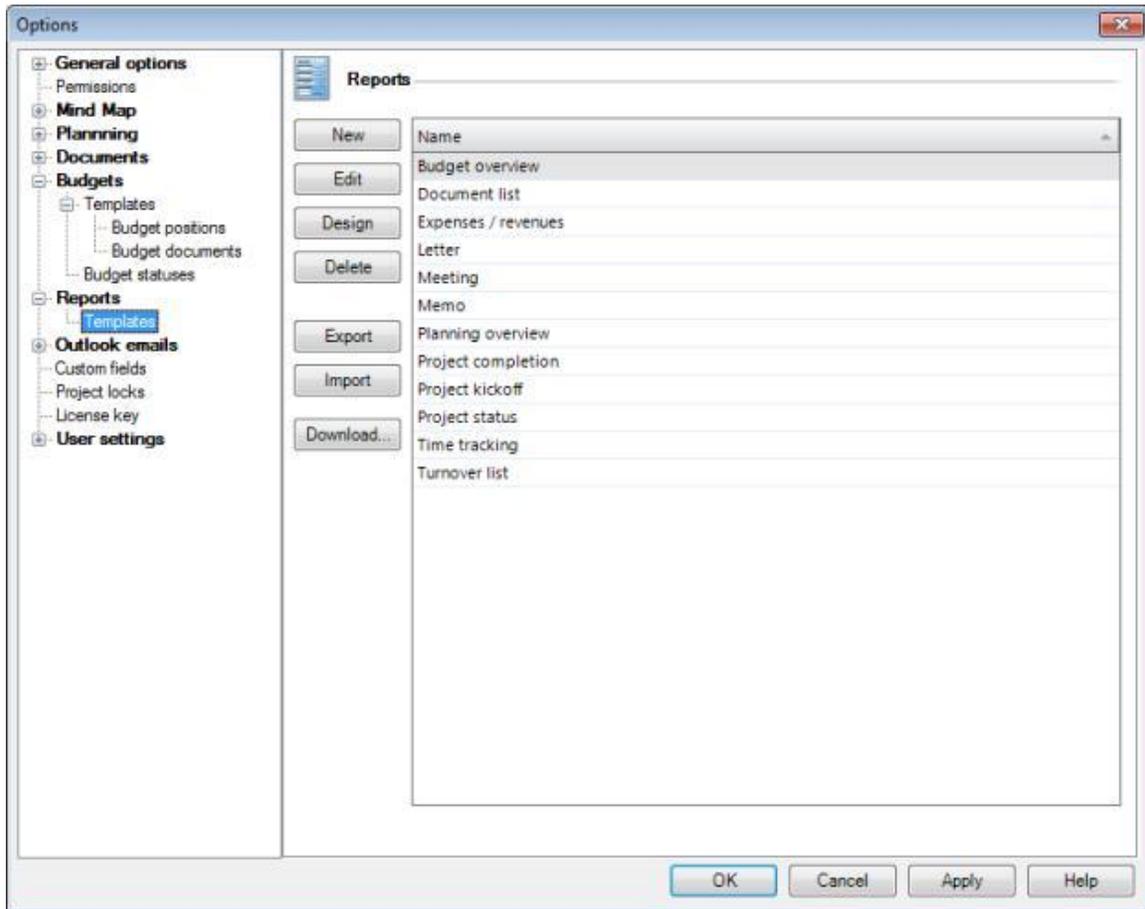

A brief summary of maintenance of report templates

1. Click on the **Options** command in the **Tools** menu of the **InLoox Toolbar**

2. Select **Reports** >> **Templates** in the navigation area to the left
   The **Reports** page is displayed

3. Select a template and click on **Edit**
   *The dialog box **Report** is displayed:*

4. Change the name as required and select project pages in which the template is to be used as the standard template

5. Click on **OK**

6. Click on **Design**
    *The dialog box **InLoox Report Designer** is displayed:*

7. The following gives an example of how to add an additional data column to the **Time tracking** report. In **Report structure** area click on **Table: Projects.TimeTracking** under the **Table: Projects** (this is sorted numerically in the upper frame).
The dialog box **Table Contents** *is displayed:*

8. Click on the symbol 🗒 **Insert column**
   *The dialog box **Edit Table** is displayed*:

9.

10.

11.

12.

13.

14.

15.

16.
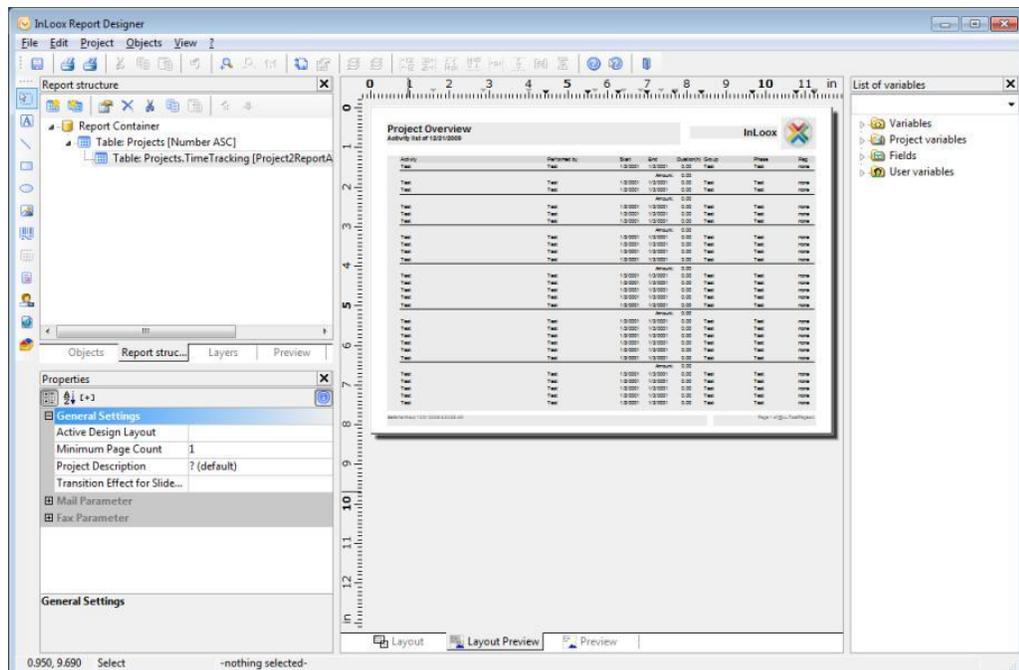
INLOOX OPTIONS: REPORT TEMPLATES: TYPES OF REPORT TEMPLATES

The following templates are included with InLoox as standard:

Predefined template types:

Report template	Usage in InLoox
Budget overview	For exporting **data** from the **Budget** page across all projects in the InLoox Project Overview
Document list	For exporting **documents** from the **Document** page
Expenses / revenues	For exporting budgets of type **expenses and revenues** from the **Budget** page across all projects in the InLoox Project Overview
Letter	Correspondence concerning the project
Meeting	Meeting organization document
Memo	Memorandum
Planning overview	For exporting **planning items** from the **Planning** page across all projects in the InLoox Project Overview
Project completion	Correspondence at end of project
Project kickoff	Correspondence at start of project
Project status	Outlook email with current project status
Time tracking	For exporting **time tracking entries** from the **Time Tracking** page across all projects in the InLoox Project Overview
Turnover list	For exporting **turnover lists** from selected projects in the InLoox Project Overview via the **InLoox Ribbon Menu / Toolbar**

INLOOX OPTIONS: CUSTOM FIELDS

Custom fields permit you to expand the data model of InLoox to suit your own requirements. New fields can be created for the entire project or for one aspect of it: mind maps, planning, time tracking, documents or budgets. Field names are freely definable. InLoox supports several data types in custom fields.
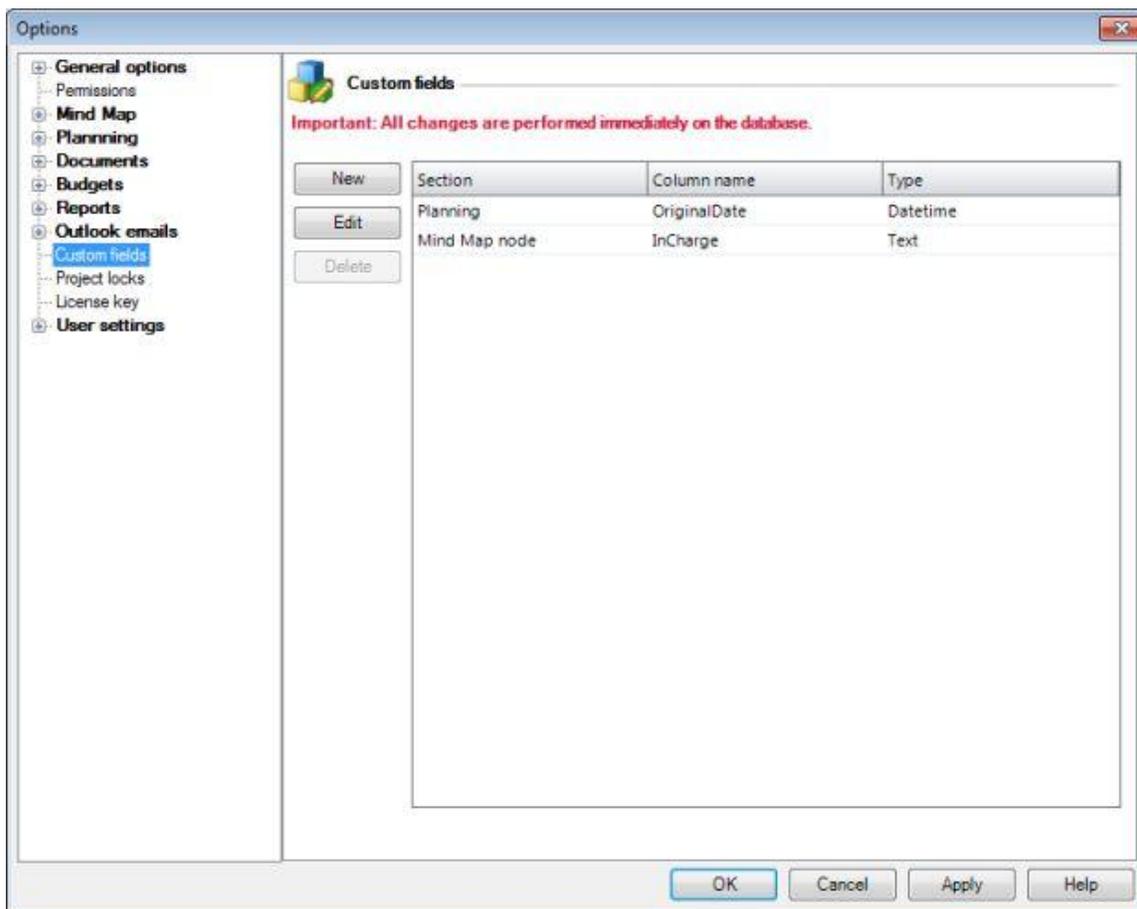
Detailed description of the **user-based Permissions** area:

1. **New**: creates a new custom field
   *The dialog box **New Custom Field** is displayed:*
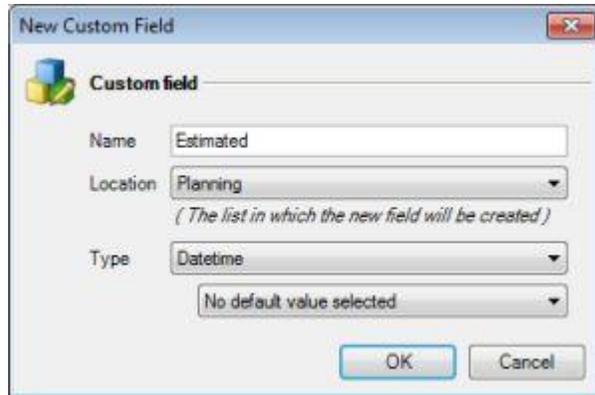
- Input a **Name**

- Select the intended **Location** of the field (i.e. which list)

- Select a **Type** for the new field. Possible types are:

  - **Text**: free text value / string

  - **Integer**: integer value without decimal point

  - **Decimal number**: decimal number with decimal point

  - **Checkbox**: yes/no

  - value

  - **Datetime**: date value without time

  - **List**: set of free text values / strings

  - **Currency**: decimal number with decimal point and currency symbol

- **Optional**: define a default value by selecting **Edit default...** in the list

  - Enter a **Default value**

  - The field type **List** also support to:

    - change the order of the list items

    - specify, whether users may enter own values (**Allow add new items**)

    - specify, whether empty selections are valid (**Allow empty selection**)

  - Click on **OK**

- Click on **OK**

2. **Edit**: changes the selected custom field. You can only modify **default values**

3. **Delete**: removes the selected custom field

Notes

When a custom field is **deleted** all contents of it in all projects are permanently lost.

INLOOX OPTIONS: PROJECT LOCKS: CLEANING UP PROJECT LOCKS

InLoox applies to projects being worked on a so-called record lock feature. Under certain circumstances this lock can remain in place, for example when a VPN user unexpectedly got disconnected from the network. To clean up all record locks in the current InLoox folder, proceed as follows:

⚠️**Only clean up the project locks after all users have saved and closed their projects.**

A brief instruction on cleaning up locks

1. Click on the command **Delete project locks** in the **Project locks** section of the **InLoox Options** dialogue

2. Confirm the safety query with **Yes.**

Detailed information

Installation

DETAILED INFORMATION: INSTALLATION

Please note that Outlook must already be installed and fully operational before InLoox is installed. The installation usually takes no longer than five minutes per client. The server installation (only required for InLoox **Workgroup** and **Enterprise** Edition) can be performed out from the client.

Step-by-step instructions for the installation can be found in the **Download area** of the **Support Center**:

- for InLoox **Personal**

- for InLoox **Workgroup**

- for InLoox **Enterprise**

The download area contains an **MSI package** for deployment via software distribution to multiple clients.

In case of problems, please contact our **Installation Support**.

DETAILED INFORMATION: INSTALLATION: SUPPORT

Outlook is a complex software product. Difficulties in connection with the installation of InLoox are not common but are too complex and too new to have been described in the Help file. **Please note that we can unfortunately only deal with problems arising from the installation of InLoox and not with general Outlook problems. Please also note that we are in the CET time zone (GMT+1).**

InLoox GmbH

Internet: www.inloox.com/support/

Email: support@inloox.com

Phone: +49 (89) 358 99 88 22

Configuration

DETAILED INFORMATION: CONFIGURATION

This chapter describes the customizing and configuration options of InLoox.

Data Storage and Management:

- InLoox is a database-oriented software product integrated with Outlook and uses **SQL (Standard Query Language)** for its data management. More information on this topic can be found in the chapter on Data Storage.

- The Project Recycle Bin permits the restoration of projects deleted by users

- The chapter Data Backup explains how to use your existing backup systems to secure your InLoox data resources.

- The chapter Offline Availability explains how individual workstations can be configured in InLoox **Workgroup** to allow operation of InLoox when disconnected from the network.

Error Handling:

- The chapter on Error Handling deals with common problems and proposes solutions.

- It is possible that the program will issue an exception error. More information can be found in the chapter on Program Exceptions

Expanding and modifying the InLoox software:

- It is possible to change the display, colors and columns of the **InLoox Project Overview** and transact simple **workflows**. More information can be found in the chapter on Generating Personalized Views.

- All screen texts and messages can be customized by the InLoox administrator. More information can be found in the chapter on Customizing the Language Files

- It is possible to add licenses to your InLoox installation and manage existing ones. More information can be found in the chapter on License Management

Data Storage and Management

DETAILED INFORMATION: CONFIGURATION: DATA STORAGE

There are essential differences between the current version of InLoox and earlier generations of the product.

As a consequence of providing an effective permission system and improving response times, InLoox has been redesigned to support data storage in **SQL databases** (SQL = "Standard Query Language").

The following systems are used by the various InLoox editions:

InLoox edition	Data storage
Personal	via Microsoft SQL Server Compact Edition. Data is stored in a file which normally carries the extension **.SDF** (SQL Server Compact Edition Database File). Filename is **InLoox.sdf**. The file is located in the InLoox installation folder
Workgroup and Enterprise	Database management systems supported for networked operation are: • Microsoft SQL Server (all versions and editions of SQL Server 2005 and 2008) • Oracle (versions 11g, 10g, 9i, 8i, 8.0, including "Personal", "Express" and "x64" editions) • MySQL (version 5.0)

DETAILED INFORMATION: CONFIGURATION: DATA BACKUP

To Outlook 2003/2007 View

Outlook 2010 View

Existing backup systems can be used for all **InLoox data**. The backup cycle, i.e. the frequency of backups, is determined by the number of InLoox users and the need to fall back on data as current as possible (e.g. a maximum of one week old) in an emergency. As a basic rule **daily backup** of all data is recommended if you are working with InLoox every day.

For a one-off backup click on the **InLoox** tab and then on **InLoox** in the navigation pane. Find **Backup database contents** in the list and click on it.

⚠️**Important notice**: A manual backup is not substitute for a regular data backup and is only for the transfer and migration of database contents.

A regular data backup is carried out as follows:

InLoox edition	Procedure
Personal	It is sufficient to make regular copies of the InLoox files on CD-ROM or tape. The date file, which normally has the extension **.SDF** (SQL Server Compact Edition Database File), must not be open in any program. The standard name of the file is **InLoox.sdf**. The file is held in the InLoox installation folder.
Workgroup and Enterprise	Save the entire InLoox database on the server which carries it. Any software that supports the backup while in operation of databases (scheme and data) for the database management system you are using may be used. Unfortunately it takes very much effort to backup offline copies (database replications) located on the user's computers. We recommend to synchronize workstations with the database server at frequent intervals; this strategy reduces the risk of losing changes which were made offline.

⚠️**Important notice**: Documents stored in InLoox must be backed up separately. InLoox only saves links to these objects, a backup of the InLoox database is not sufficient to back up the documents as well. The backup strategy and software depend on the storage location of the documents (files on the local computer, the server or the SharePoint document library), the number of users and the data volumes.

To Outlook 2010 View

Outlook 2003/2007 View

Existing backup systems can be used for all **InLoox data**. The backup cycle, i.e. the frequency of backups, is determined by the number of InLoox users and the need to fall back on data as current as possible (e.g. a maximum of one week old) in an emergency. As a basic rule **daily backup** of all data is recommended if you are working with InLoox every day.

For a one-off backup there is the menu command **Backup database contents** under **Tools** in the **InLoox Toolbar**.

⚠️**Important notice**: A manual backup is not substitute for a regular data backup and is only for the transfer and migration of database contents.

A regular data backup is carried out as follows:

InLoox edition	Procedure
Personal	It is sufficient to make regular copies of the InLoox files on CD-ROM or tape. The date file, which normally has the extension **.SDF** (SQL Server Compact Edition Database File), must not be open in any program. The standard name of the file is **InLoox.sdf**. The file is held in the InLoox installation folder.
Workgroup and Enterprise	Save the entire InLoox database on the server which carries it. Any software that supports the backup while in operation of databases (scheme and data) for the database management system you are using may be used.
	Unfortunately it takes very much effort to backup offline copies (database replications) located on the user's computers. We recommend to synchronize workstations with the database server at frequent intervals; this strategy reduces the risk of losing changes which were made offline

Important notice: Documents stored in InLoox must be backed up separately. InLoox only saves links to these objects, a backup of the InLoox database is not sufficient to back up the documents as well. The backup strategy and software depend on the storage location of the documents (files on the local computer, the server or the SharePoint document library), the number of users and the data volumes.

DETAILED INFORMATION: CONFIGURATION: PROJECT RECYCLE BIN

To Outlook 2003/2007 View

Outlook 2010 View

Projects that are deleted in the InLoox Project Overview land first of all in the project recycle bin. This ensures that in networked operation only users with administrator permission are allowed to delete projects permanently. The recovery option improves data protection and allows to simply restore deleted projects.

A brief instruction on the project recovery:

1. Click on **Recycle Projects** in the **InLoox Ribbon Menu**
    The dialog box **Project Recycler** *is displayed.*
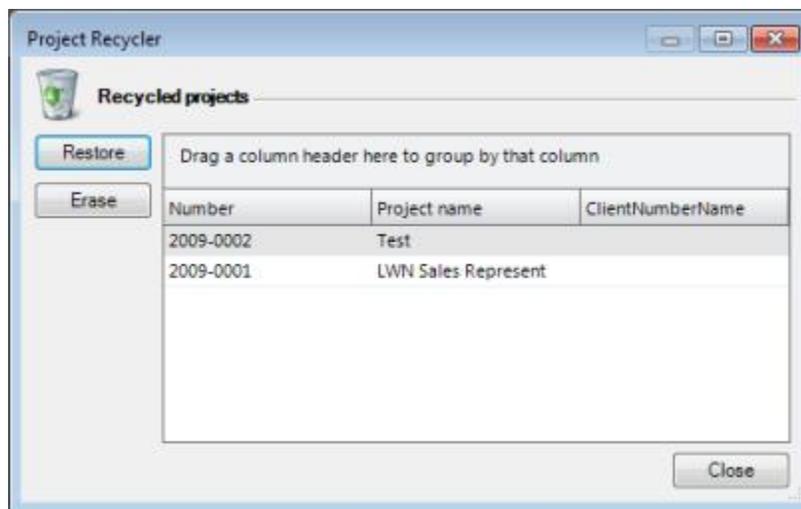
2. Select a project and click on **Restore**
    InLoox restores the project.

3. Click on **Close**

To Outlook 2010 View

Outlook 2003/2007 View

Projects that are deleted in the InLoox Project Overview you will find in the project recycle bin. This ensures that in networked operation only users with administrator permission are allowed to delete projects permanently. The recovery option improves data protection and allows to restore deleted projects easily.

A brief instruction on the project recovery:

1. Click on the menu point **Tools** >> **Recycle Projects** in the **InLoox Toolbar**
    *The dialog box **Project Recycler** is displayed.*

2. Select a project and click on **Restore**
    InLoox restores the project.

3. Click on **Close**

Note

When a project is **deleted** from the recycler, all data are permanently lost.

DETAILED INFORMATION: CONFIGURATION: OFFLINE AVAILABILITY

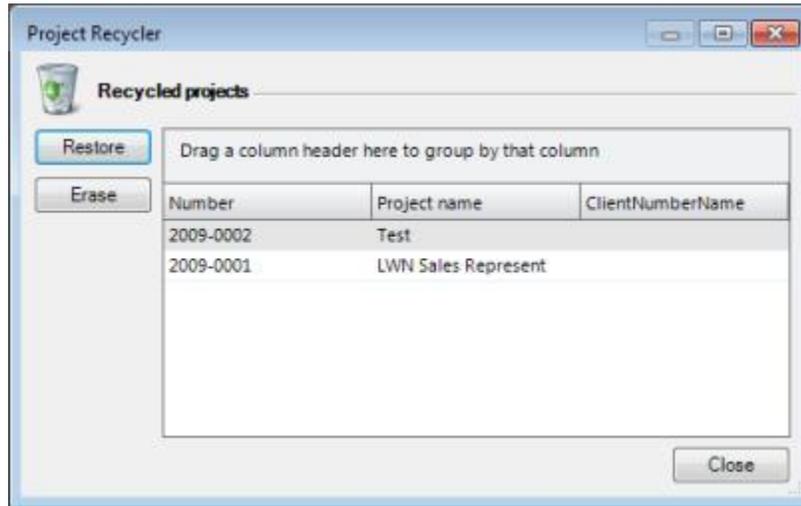Users of InLoox **Workgroup** and **Enterprise** work on a database server. It is possible however to configure individual workstations to operate InLoox separately from the network. When reconnecting with the company network, an automatic synchronization is carried out.

Important notice: Not all database systems support offline availability or replication. InLoox offers the data structures that are needed for synchronization and replication but uses the synchronization features of the database system. In certain circumstances it may necessary to change the database system or related software to take advantage of offline availability. Check the documentation of your database system regarding offline availability and replication.

Step-by-step instructions for the configuration of InLoox for offline operation can be found in the **Download area** of the **Support Center**

If you have problems please refer to our **Installation Support**.

Troubleshooting

INLOOX ERROR MESSAGES

Below is a list of error messages and proposed solutions.
If the problem cannot be solved from here, please refer to our support service, who can be reached online under www.inloox.com/support/

Database-oriented errors

Error message	Solution
Error: The InLoox database is not available. Error on establishing link with the server...	• Check that the network is accessible. • Check whether offline configuration, if any, is correct. • Refer to your system administrator.
You are using InLoox client version X.X. The InLoox database version is Y.Y. Please ensure that you are using the appropriate version of the product or refer to your system administrator.	The InLoox client version being used does not match the database version on the server. please update the InLoox client.

License-oriented errors

Error message	Solution
The license code input does not tally with version of InLoox being used.	The license code you have input is for an earlier or later version of InLoox. More information can be found in the chapter on License Management
A licensing error has occurred. Please check the license code or refer to your system administrator.	The license code you have input is not valid for the installed version of InLoox. Please request a valid license code. More information can be found in the chapter on License Management
The maximum number of clients has been reached. It is not possible to use InLoox. Please check the license code or refer to your system administrator.	Your InLoox installation is licensed for a specific number of workstations. This number has been exceeded. Please obtain a supplementary license for the required number of additional workstations. More information can be found in the chapter on License Management

Report-oriented errors

Error message	Solution
The report template contains an error. An expression used in the template is incorrect. Please correct the report template.	Please check the report template with the help of Documentation for the InLoox Report Designer
The report contains no data. Empty reports cannot be created. Please edit the report template.	The report template is empty. Please update the template with the help of the chapter Detailed Information: Configuration: Customizing Report Templates and the Documentation for the InLoox Report Designer
No printer is installed. Please install a printer to output reports.	A printer must be installed to output a report. Please install the driver needed by your printer. For more information please refer to the user manual for your printer.

PROGRAM EXCEPTIONS IN INLOOX

There are certain rare configurations that will cause the software to behave unpredictably. To cater for this we have developed a special message dialog box which permits more accurate examination of the problem. If such an exception occurs in your installation, there are various ways of informing us of it. These options are described below.

InLoox dialog box for exception handling:

This dialog box allows our developers to localize an unpredicted condition more precisely and make future versions of InLoox more stable.

Click on **Details:**
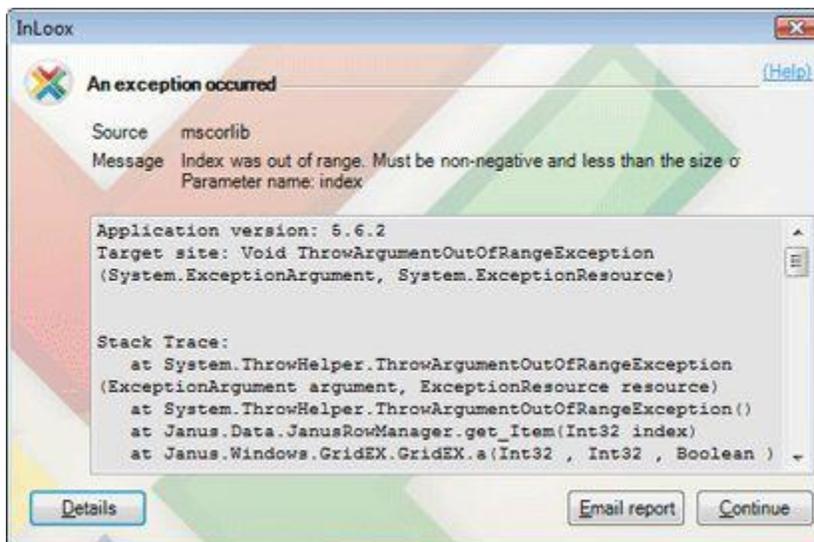
All the exception data that the system has compiled are displayed.

Use the button **Send report by email** to send us the error via your email program.

This mail does not contain any personalized information or database contents, except your sender email address. This allows our technical staff to solve the exception in direct collaboration with you.

This information is sent to our technical staff:
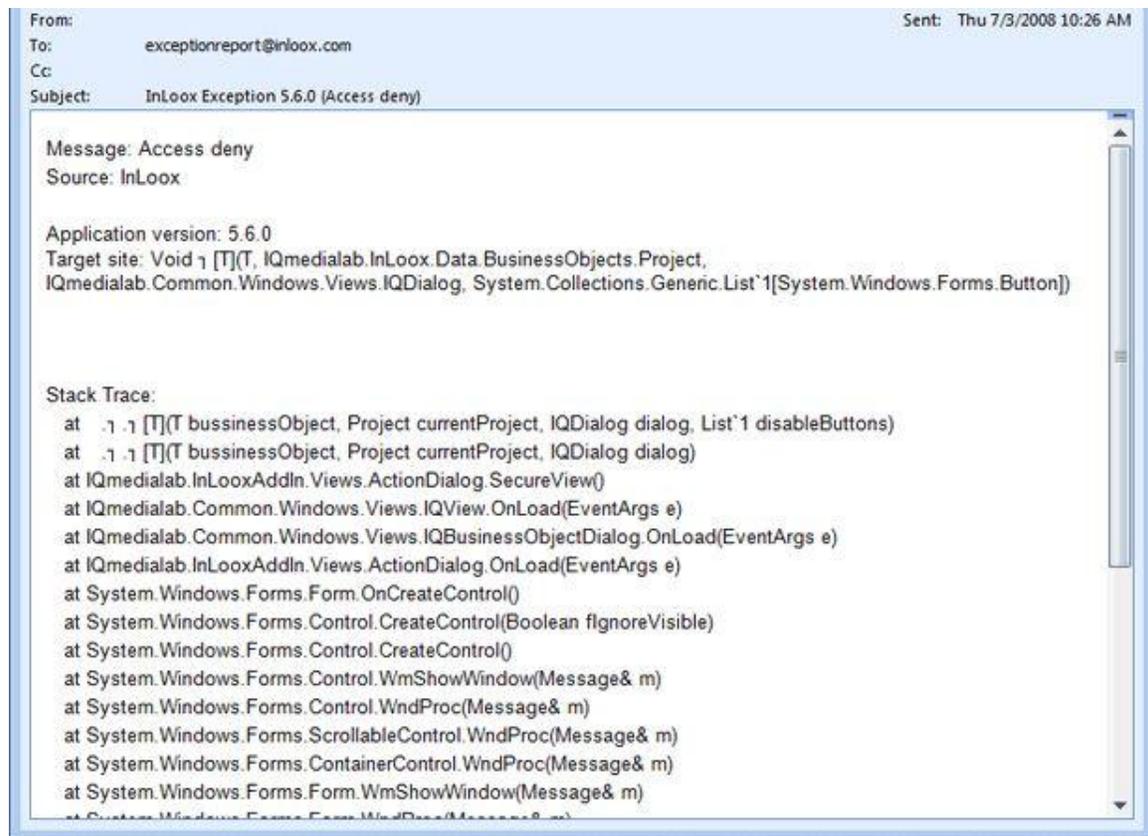
You can, of course, also contact our Support directly in the usual manner. Please be sure to have the contents of the exception dialog box to hand.

Extending and Customizing InLoox

DETAILED INFORMATION: CONFIGURATION: CHANGING THE LANGUAGE

To Outlook 2003/2007 View

Outlook 2010 View

InLoox is a multilingual system. The operating language adjusts automatically to the **Region and Language Options** in the **Windows Control Panel**. The language can be changed manually during operation of InLoox at any time without the need to restart.

A brief instruction on changing the operating language:

1. Click on the tab **File**

2. Click on InLoox in the navigation pane

3. Click on **Change language**

4. Select a language, e.g. **German**, **English**, **French**, **Italian**, **Spanish** or **Russian** from the list
    InLoox changes the language of all screens

To Outlook 2010 View

Outlook 2003/2007 View

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A brief instruction on changing the operating language:

1. Click on the menu **Tools** in the **InLoox Toolbar**

2. Move the cursor to the menu command **Tools >> Language**

3. Select a language, e.g. **German**, **English**, **French**, **Italian**, **Spanish** and **Russian** from the list
    InLoox changes the language of all screens.

DETAILED INFORMATION: CONFIGURATION: CUSTOMIZING THE INLOOX LANGUAGE FILES

InLoox uses so-called resource files for all texts and messages that it displays. These are located in the program folder on the InLoox client.

⚠️**Important Notes:**

- Changing the files can cause problems with the program, especially if data are deleted.

- When you re-install the InLoox client setup will overwrite any changes you have made to the language files.

List of language files (as delivered)

Filename	Contents
InLoox.resources	Standard language (English)
InLoox.de.resources	German-language version
InLoox.fr.resources	French-language version
InLoox.es.resources	Spanish-language version
InLoox.it.resources	Italian-language version
InLoox.ru.resources	Russian-language version

A brief summary of how to customize the language resource files:

1. Close Outlook on the client concerned.

2. Open the relevant language file with the **InLoox Resource Editor**. This tool can be found in the **Download area** of the **Support Center.**

3. Make the required changes to the file and save.

4. Test the changes on the InLoox user interface.

5. Distribute the file among other InLoox clients as required.

LICENCE MANAGEMENT

To Outlook 2003/2007 View

Outlook 2010 View

At the time of **Installation** you have specified a valid license code.

The license code consists of five groups of six alphanumeric characters each in the following format: **111111-222222-333333-444444-555555**

Your license code is valid as follows:

- for one version of InLoox (**Personal 6.x**/**Workgroup 6.x**/**Enterprise 6.x**)

- for a specific number of clients and servers

- for an unlimited time

The following restrictions apply:

- InLoox Personal **cannot** be used **as a server**

- When the **maximum number** of registered clients (workstations / computers) has been reached, InLoox will no longer function on any clients on which it was last installed or started.

- The license manager on the terminal server counts the number of **active users** for whom InLoox has been released

InLoox monitors the permissible number of clients. The following message is displayed to indicate that there are too few licenses:

*"The maximum number of clients has been reached. It is not possible to use InLoox.
Please check the license code or refer to your system administrator."*

The following procedure is needed initially to be sure that only those clients and/or active users on which InLoox is currently installed are counted:

1. Click on the tab **File**

2. Click **Options >> License** in the navigation pane
   This menu command is only displayed to users with InLoox administrator permission

3. In the dialog box **InLoox License Manager** click on the button **Remove Client Licenses**

4. Click **OK**

If the error message persists, InLoox must be removed from the excess clients or additional licenses acquired. Please refer to your reseller or the manufacturer for this. You will receive by return a license to release the required number of clients for operation of InLoox.

To Outlook 2010 View

Outlook 2003/2007 View

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Please check the license code or refer to your system administrator."*

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1. Click on the menu command **Options >> License** in the **InLoox Toolbar**
   This menu command is only displayed to users with InLoox administrator permission.

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3. Click **OK**

If the error message persists, InLoox must be removed from the excess clients or additional licenses acquired. Please refer to your reseller or the manufacturer for this. You will receive by return a license to release the required number of clients for operation of InLoox.

Legal Notices and Agreements

END USER LICENSE AGREEMENT (EULA)

License Terms of InLoox GmbH

End-User License Agreement (EULA)

By using this Software Product (including installation and copy) you declare that you agree with this Agreement as a natural person and legal entity. If you do not agree with this EULA you are not entitled use the Software.

§ 1 Validity of the Terms of Agreement

(1) This End User License Agreement (EULA) is concluded between you – hereinafter also referred to as Customer – and InLoox GmbH – hereinafter also referred to as InLoox. The licensing / purchase of Software and obligations precedent to the Agreement shall exclusively be subject to the Terms of Agreement unless otherwise agreed. We exclusively refer to the regulations of the General Terms of Business of InLoox which are integrated into this Agreement and form an essential part of it. The Customer confirms that he has taken note of the General Terms of Business of InLoox. The regulations of the General Terms of Business are extended and/or supplemented by the objective License Terms of InLoox with regard to the use of software and other software-specific regulations and the corresponding rights and obligations. In case the General Terms of Business of InLoox deviate from this Agreement or if they are inconsistent with it, these License Terms shall prevail.

(2) InLoox licenses/sells the enclosed Software to the Licensee (Customer) exclusively on the basis of the License Terms hereinafter. In case you do not agree with these Terms, do not open the package or seal of the Software, refrain from installing the Software, click on the "No" button of the installation process and uninstall the Software when the corresponding inquiry occurs during the installation and return the properly purchased Software together with packaging, license key and receipt voucher to the Software vendor within 30 days of the purchase of the Software. Subsequently, you will receive full reimbursement of the purchase price you paid.

§ 2 Subject Matter of the Agreement

(1) Subject matter of this Agreement is the granting of the rights of use in accordance with §3 depending on the type of license purchased in each case and its extent of functions. By purchasing this Software you become the owner of the Software storage medium (e.g. a CD-ROM), but not of the Software itself. The Software is licensed, not sold. The Software shall always remain the intellectual property of InLoox. As a purchaser of the Software you shall only be entitled to use the proprietary object, i.e. to use the Software as agreed upon. InLoox grants this right of use in the form of a license.

(2) The Customer has checked whether the Software specification meets his desires and requirements before concluding the Agreement. He knows the essential functional qualities and conditions of the Software.

(3) Product descriptions and presentations in test programs are service descriptions but are not warranties. Warranties require a written statement from InLoox company management.

(4) The Customer is not entitled to receive a license for the source program.

(5) InLoox renders all deliveries and services in accordance with the state-of-the-art.

(6) InLoox reserves all rights which are not explicitly mentioned in this EULA.

(7) If the Software is marked "Not for resale" (or "Nicht zum Weiterverkauf bestimmt") in any way it may neither be resold nor transferred.

(8) The Software may then be exclusively installed on a network server if the License purchased by the Customer is explicitly designated as "server license". In the event that the Software is used in a network the Customer must ensure that there is a License for each data processing unit having access to the server and the possibility to use the Software.

(9) The software is licensed as a whole. You may not separate its components and/or use it for distinct application on more than one computer other than described in the software user documentation.

§ 3 The Customer's Rights to the Software

(1) The Software, all additional programs, the symbols used, InLoox logo, written documents as well as documentation are legally protected. The copyright, patent rights, trademark rights and all other rights in goods and services as well as industrial property rights to the Software and other above-mentioned objects which InLoox makes available or hands over to the Customer as part of the process to set up and implement the Agreement are the exclusive property of InLoox in the relationship of the Parties. Should third parties be entitled to any rights, InLoox shall have the corresponding rights of use.

(2) The Customer purchases the Software in order to use it for his own purposes on a permanent basis (non-exclusive license). The Customer is entitled to use the quantities of Software for which he purchased licenses. The Customer shall ensure that the number of copies of the Software installed simultaneously corresponds to the maximum number of purchased licenses. InLoox hereby grants the Customer the right to use the programs which are necessary for these purposes as well as the right to copy programs on the main memory and hard disks as well as the right to correct errors. The Customer is entitled to make backup copies of the programs necessary for safe operation. The backup copies must be marked as backup copies. Copyright notes must not be deleted, changed or suppressed. The Customer may exclusively use the Software for each license on a standalone computer, no matter if it is a workstation, notebook or PDA except in such cases where he purchases a network license. The use of the Software also implies loading the Software into the temporary memory of a computer or similar object or installing the software on a permanent storage medium (e.g. hard disk, DVD, CD-ROM, or similar). However, the Parties may come to differently worded agreements in an individual Agreement issued in writing.

(3) A user manual and any other documents possibly provided by InLoox may only be copied for the company's internal purposes.

(4) The Customer shall not be entitled to transfer the Software without the written consent of InLoox; this applies in particular in the event of sale. InLoox shall agree to the passing-on of the Software (in whole or in part) to a third party under the following conditions:

– The Customer hands over the original data storage media (if there is one), this EULA and the General Terms of Business of InLoox to the third party, deletes all other copies in particular on data storage media, in read-only memories or main memories, he definitely stops using the Software and submits a written confirmation of the fulfillment of his duties to InLoox.

– The third party declares to InLoox in writing that it has received the aforementioned components and acknowledges them as binding in the legal relationship with InLoox, noting the General Terms of Business and this EULA.

 – There are no important opposing reasons.

(5) All other acts of utilization, in particular leasing, industrial sale (unless explicitly stated otherwise by written reseller agreement/authorized dealer agreement), lease and distribution of any tangible or intangible property are prohibited without the prior written consent of InLoox. InLoox notes, that customers who violate copyright laws, are liable for all damages that occur as a result of these copyright law violations.

(6) Any subject matter of the Agreement, documents, proposals, test programs, etc. of InLoox to which the Customer gains access after conclusion of the Agreement shall be considered intellectual property and must be treated confidentially as a business and company secret of InLoox in accordance with § 9.

§ 4 Contractual Obligation and Termination of the Agreement

In the event of termination due to infringement of this EULA you are obliged to return or destroy all original versions and copies of the Software and all other components and to notify InLoox of the destruction in writing.

§ 5 Obligations of the Customer

(1) In the event that you are a business owner you undertake to inspect all delivery items of InLoox immediately upon receipt of the goods in accordance with the regulations of commercial law (§ 377 of the German Commercial Code) and to make complaints in respect of defects with an exact description of the defect, submitted in writing. Each Customer is obliged to test all modules with regard to usability in the concrete situation before starting any operative use. This also applies to programs the Customer receives in the context of supplementary performance or a possible maintenance agreement.

(2) The Customer shall take adequate precautions to counter situations where the program does not operate properly in whole or in part (e.g. by data backup, error diagnosis, regular check on the results). The Customer shall be responsible for ensuring the operation of the working environment of the program. He shall be obliged to carry out the necessary adjustments to his firewall, virus scanners or similar data protection mechanisms in his network as well as his server. InLoox shall not bear the risk of incompatibility of the Software with the software or hardware used by the Customer.

(3) You shall not be entitled to use or modify the logo and/or trademarks of InLoox unless the company management of InLoox has given its prior agreement to the use or modification of the logo in writing.

(4) Subject to the provisions of § 69 e German Copyright Act (UrhG) you may not reverse engineer, decompile or disassemble the Software.

(5) You undertake to indemnify and defend InLoox from all claims of third parties, including reasonable lawyers' fees arising or resulting from any use of this Software against the agreement.

§ 6 Warranty

1. Delivered software possesses the agreed-upon characteristics, is suitable for the applications assumed by the contract and which are otherwise standard, and has usual quality of software of this type. Not every flaw which is connected with the software is a defect which implies warranty rights. An impairment in the software's functioning which results from hardware defects, environmental conditions, improper operation and the like, is not a defect. An insignificant deterioration in quality will not be taken into account. InLoox guarantees that no rights of third parties are violated through the use of the software by the customer in accordance with the provisions of the contract.

2. Customers who are consumers within the meaning of § 13 German Civil Code (BGB) have in respect to defects of the purchased good the rights set out in the German Civil Code (BGB). In case that a consumer is entitled to claim damages hereafter, § 7 applies accordingly.

3. In all other cases of liability for defects the following terms apply:

a) InLoox may first attempt to remedy any material defects. InLoox may choose to remedy the defect by eliminating it, i.e. also by demonstrating possibilities by means of which the effects of the defect can be avoided, or through delivery of a program which does not contain the defect. An equivalent new program version or the equivalent previous program version which had not contained the faults is to be accepted by the customer, when this is reasonable. In the case of defects in title, InLoox shall give the assurance that it will provide the customer with legally unchallengeable option to use either the software or equivalent software, at its option.

b) The customer shall support InLoox in the analysis of faults and removal of defects by specifically describing problems which occur, providing InLoox with complete information and granting it the necessary time and opportunities to remove the defect. InLoox may also remove the defect on-site or at its place of business, at its discretion. The performance of InLoox may also take the form of remote maintenance. The customer must ensure the necessary technical prerequisites at his own expense and, after due prior notification, provide InLoox with access to his computer equipment.

c) InLoox may levy additional charges, when the software is modified, employed outside the environment provided for or incorrectly operated. It may demand compensation if no defect is found or if it is incorrectly/insufficiently informed of a fault. The burden of proof lies with the customer in accordance with § 254 German Civil Code (BGB).

d) If InLoox ultimately refuses to remedy the defect, if it ultimately is unsuccessful or if this is unreasonable for the customer, he may withdraw in writing from the contract or correspondingly curtail the payment and in accordance with § 7 demand damages or reimbursement of expenses.

e) Insofar as the above has not been otherwise agreed, further liability on the part of InLoox within the meaning of liability for defects is excluded. In particular, liability for defects does not apply if and to the extent that the software is improperly used by the customer or used in a defective or incompatible hardware or software environment. The same applies in the event that the customer undertakes unauthorized modifications of the software.

g) The statute of limitation for claims for defects is one year as of the statutory commencement of the limitation period.

§ 7 Liability

The following limitations of liability apply in case of claims for damages of the customer arising from liability for defects or from any other reasons:

1. InLoox is liable for intent and gross negligence in accordance with the statutory provisions. The same applies to injury of life, body or health as well as to claims arising from warranties or from the German Product Liability Act (Produkthaftungsgesetz, ProdHaftG).

2. Moreover, InLoox is only liable for culpably infringing contractual obligations the fulfillment of which renders a correct execution of the contract possible, and the customer can always trust on said material obligations being observed (cardinal obligation). This includes, in particular, the obligation to fulfill a performance free from defects. In this case InLoox's liability is limited to the loss or damage foreseeable upon conclusion of the contract.

3. A further liability of InLoox is excluded.

4. Should the liability for damages on the part of InLoox be excluded or reduced, this shall also apply with regard to personal liability for compensation for damages on the part of its employees, representatives and persons employed in auxiliary tasks.

5. The right to contest the charge of contributory negligence remains open to InLoox. It is pointed out to the customer that, within the framework of his obligation to exercise diligence, before using the software for the first time, he must test whether the installation of the software might lead to particular interference with pre-installed software, and that he must further ensure back-up of his data before the first installation as well as during the course of operations and, in the case of a suspected fault in the software, that he implements all additional reasonable measures required for security.

6. The statute of limitation for claims of the client who is not a consumer is one year as of the statutory commencement of the limitation period.

§ 8 Software Updates and Upgrades

At the sole discretion of InLoox, users may be provided with updates and upgrades to the Software. InLoox retains the right to provide upgrades for a fee. Upon installation of an upgrade, users shall not use, separate or transfer the previous version to a third party separately. Unless InLoox provides other terms and conditions with an update or upgrade, the terms and conditions of this EULA shall continue to apply. Users may refuse to accept an update or upgrade. However, upon release of an update or upgrade, InLoox may have no further obligation to support the previous version.

§ 9 Start and End of the Customer's Rights

(1) The ownership of the supplied items and the rights in accordance with § 2 and § 3 shall not be transferred to the Customer until complete payment of the purchase price. Before that, he only has a preliminary right of use in accordance with the law of obligations, revocable in accordance with § 9 (2).

(2) InLoox shall be entitled to revoke the rights in accordance with § 2 and § 3 for important reasons, in particular for the reasons specified in § 3 of the General Terms of Business of InLoox or to terminate the Agreement respectively. An important reason particularly exists if the Customer does not affect the due payment, if he continues to infringe the obligations under § 2 and § 3 of this Agreement in a substantial way, despite written reminders, or in the event that a petition of bankruptcy has been filed in respect of the customer's assets.

(3) If the right of use in accordance with § 3 in conjunction with § 2 does not occur or if it should end, InLoox shall be entitled to demand from the Customer the return of the provided goods or demand a written assurance that they have been destroyed and that all copies have been destroyed, along with the written assurance that this has been effected.

§ 10 Secrecy

(1) The Contracting Parties undertake to treat all objects they receive from the other Contracting Party or objects they gain knowledge of (e.g. software, documents, information) which are legally protected, contain business or company secrets or are designated as confidential, confidentially - even beyond the expiration of the Agreement, unless these objects are publicly known without any infringement of the obligation of secrecy. The Contracting Parties shall store and save these objects in such a way that any unauthorized access by third parties is excluded.

(2) The Customer permits access to the subjects of the Agreement only by his personnel or third parties requiring access in order to perform their assigned tasks. He shall inform these persons about the need for these objects to be kept confidential.

§ 11 Applicable law, legal venue

The law of the Federal Republic of Germany shall be applicable, excluding the United Nations Convention on Contracts for the International Sale of Goods. The place of performance and legal venue for all disputes arising from and in connection with this Agreement shall be the registered office of InLoox GmbH (Munich, Bavaria) for agreements with business owners (traders). This also applies if the customer does not have a general place of jurisdiction in Germany or if his place of residence or usual abode is unknown at the time the proceedings are brought forth.

§ 12 Safeguarding Clause

If any provision of this Agreement should be or become invalid, such invalidity shall not affect the validity of the other provisions of this Agreement even if essential provisions are concerned. The Parties agree to replace the invalid provision by a legally effective regulation which comes as closest to the contractually stipulated legal and economic intent of the invalid provision and ensures the operability of the Agreement in the sense of what both Parties had intended. The same shall apply in the event that the Parties have not discovered a gap in the provisions at the time the Agreement was concluded or if such a gap becomes known or occurs later. In that case, the Parties shall be obliged to generate a written supplement to the Agreement in the sense of the aforementioned.

Date: 2007-04-12

COPYRIGHT, TRADEMARKS

Give Feedback

DIALOG: RATE INLOOX

Choose **?** >> **Rate InLoox**

1. The Dialog **Rate InLoox** is displayed

2. Set up the number of stars by clicking on them

3. If required write a comment

4. Click on OK. The feedback now is send directly to the InLoox product development

DIALOG: RECOMMEND INLOOX

Would you like to recommend InLoox to you partners, suppliers or friends, click on **Extras** >> **Recommend InLoox**
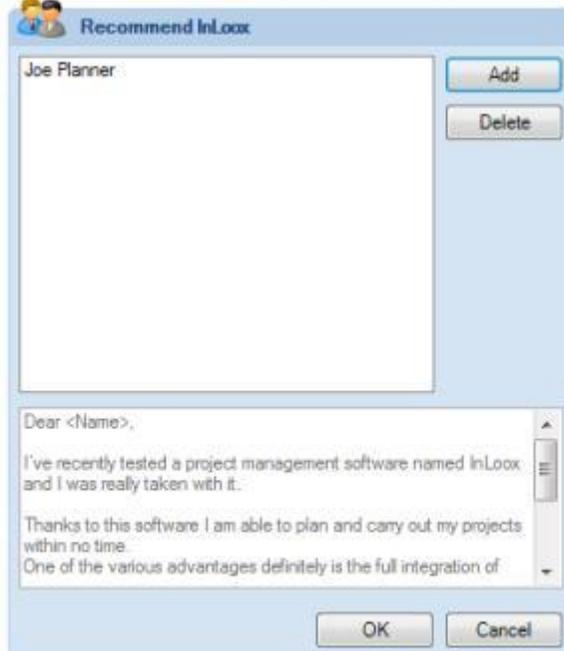
1. The **Recommend InLoox** dialog will be displayed

2. Chose the **contacts out of your Outlook address book** you want InLoox to recommend to

3. Usually you will be offered a standardized text. You can change this text

4. Click on **OK**

5. **InLoox will be recommended**

If you **don't want to recommend InLoox not yet**, choose

1. **Remember me** or

2. **Remember: Never**

TROUBLESHOOTING

Microsoft Outlook is a highly sophisticated product which is constantly under development. With ongoing Office and security updates, Exchange Server service packs and new versions of Windows, there is a wide range of supported platforms for InLoox.

Solutions for error messages are to be found under InLoox error messages.

Customers of InLoox, the manufacturer of InLoox, have access to a comprehensive, up-to-date support service for the entire range of InLoox products. Support service can be reached online under www.inloox.com/support/

Note:

- Please have your **customer number** to hand.

- You can also contact the manufacturer directly.

TRADING PARTNERS

Would you like to include **InLoox** in your portfolio? As an **InLoox partner** you will, of course, be a reseller of software licenses in the classical sense. But much more than this, you will also be providing consulting, after-sales, training, customizing, development and system integration services. We are offering a product of high quality with an excellent price/performance ratio, targeted at a broad and highly-challenging market.

InLoox is a product of the Munich-based company InLoox GmbH. We are pleased to support our partners with marketing and sales documentation, training, and technical services and support. If you are interested in a partnership with InLoox, we will be very glad to hear from you. Our normal office hours are 9:00 am till 5:00 pm, Mondays to Fridays. Please note that we are in the CET time zone (GMT+1).

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