InLoox First Steps

Inhalt

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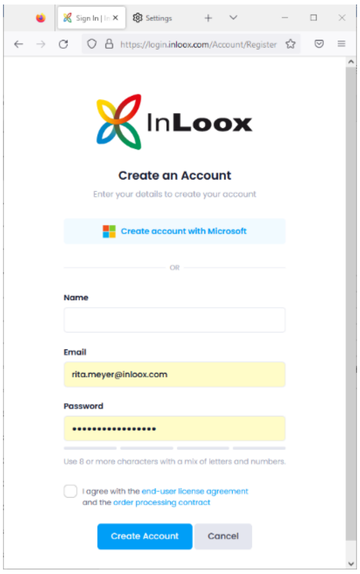
Create an InLoox Account

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

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



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

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

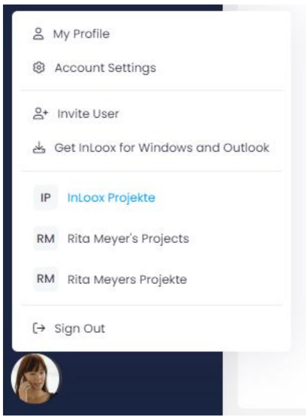
PLEASE NOTE: The person that creates the InLoox account automatically holds all administrative permissions. You can change these permissions in InLoox Web App in the settings.

Invite your Team to InLoox

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

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

2. Click on **Invite User**.



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

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

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

Assign User Licenses

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

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

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

Set Permissions (Users, Divisions, Roles)

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

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

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

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

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

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

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

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

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

Set InLoox Login

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

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

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

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

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

Accept an Invitation to an InLoox Account

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

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

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

Set up InLoox for Outlook Modern Add-in

PLEASE NOTE: The InLoox for Outlook Modern add-in is the successor to the classic COM add-in. We recommend only using the new Modern Add-in in combination with InLoox Web app. Learn more »

System requirements

1. Microsoft Exchange® Online (usually part of Microsoft 365)
2. One or more of the following products:
   - Windows: Microsoft Outlook® 2016 or higher / Microsoft Outlook® for Microsoft 365 in latest version
   - Mac: Microsoft Outlook® 2016 for Mac or higher / Microsoft Outlook® for Mac in latest version
   - Microsoft Outlook® on the web
3. Connection to the Internet / the InLoox On-Prem Server

The Modern Add-in works in both the old and the new Outlook and is also suitable for Apple users.

Installation

There are generally two ways to get the add-in into your Outlook:

- **Self-installation for cloud users:** Users of one of the cloud editions can download the InLoox for Outlook add-in themselves from the Microsoft Store:
  1. Visit https://appsource.microsoft.com/en-us/product/office/WA200006590 or search for *InLoox for Outlook* manually in the Microsoft AppSource.
  2. Follow the installation instructions.
  3. After successful installation, you will find an **Open InLoox Add-in** button at the top of your Outlook menu.
     PLEASE NOTE: This option is only available for users of the cloud editions. Users of InLoox On-Prem must use the following method.
- **Via your Office 365 administrator:**

1. Log in to Microsoft Office 365 with your **administrator account**.

2. Select the app launcher icon at the top left and click **Admin**. Alternatively, open https://admin.microsoft.com/

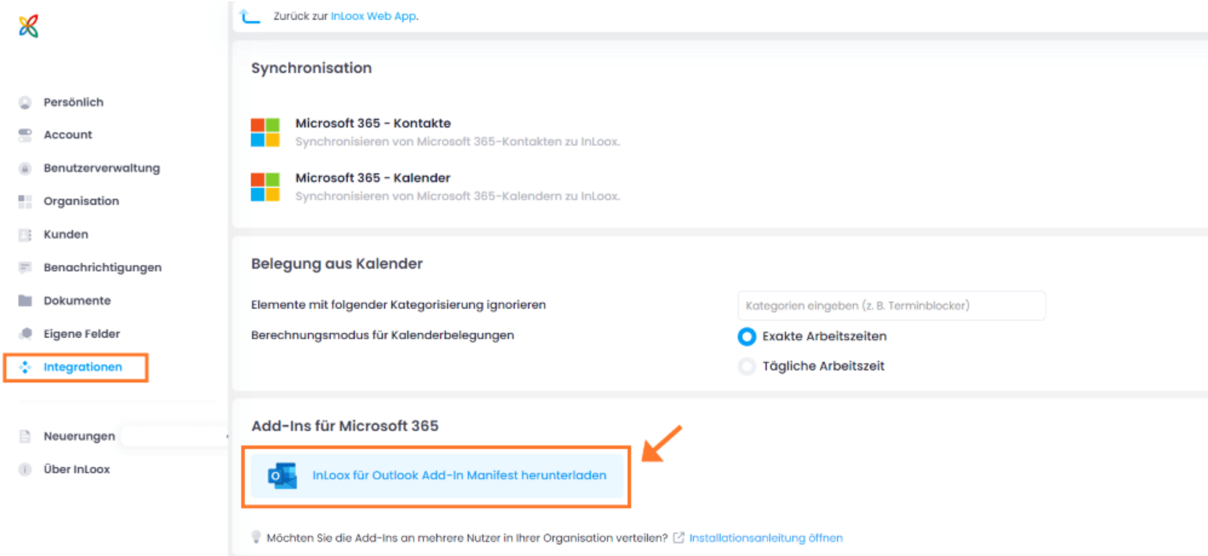
3. In the sidebar, click **Show all**.

4. In the Admin Center, go to **Settings** > **Integrated apps**.

5. Depending on your InLoox edition, proceed as follow:

For InLoox On Prem:

1. Select **Upload custom apps**.
2. In the **App type** field, select **Office Add-in**
3. Activate the checkbox **Upload manifest file (.xml) from device**.
4. Click **Choose File** to select the manifest file for the InLoox for Outlook add-in. This file can be downloaded from the **InLoox Account Settings > Integrations > Download InLoox for Outlook Add-in Manifest.**



5. Click on **Next**.

For InLoox Cloud editions:

1. Select **Get apps**.
2. Search for **InLoox for Outlook**.
3. Click **Get It Now**, then click **Get It Now** again.

6. In the "Deployment method" section, select an option to specify how the add-in will be deployed to users.

7. In the "Assign users" section, select one of the following options to specify to whom the add-in should be deployed.

- **Entire organization**: Select this option to deploy the add-in to everyone.

- **Specific users/groups:** Select this option to deploy the add-in to selected users or user groups only. Use the search option to find users or groups for whom you want to provide the add-in.
- **Just me**: Select this option to make the add-in available only to yourself.

8. Click **Next**, then click **Next** again.

9. Finally, click on **Finish deployment**. A green tick is displayed when the add-in deployment was successful.

PLEASE NOTE: Deployment on all devices can take up to 24 hours.

Install InLoox On-Prem

If you want to test or have purchased the locally installed edition InLoox On-Prem, please download the whitepaper for the installation of the InLoox On-Prem Server here: www.inloox.com/products/documents/.

On the InLoox website at www.inloox.com/support/downloads/product-releases/ please download the InLoox On-Prem **Server Installer file**.

General information

On our website, you can find more information like help articles, video tutorials and case studies.

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

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