First steps with InLoox now!

Contents

InLoox now! is the software-as-a-service project management solution by InLoox. Your project data is safely hosted in the Microsoft Cloud. You can access your project data either from your browser with InLoox now! Web App, or from Microsoft Outlook with InLoox now! for Outlook.

With your **InLoox now! trial account** you have **30 days** to try all the features of InLoox now! **with up to 4 more users**. Should you have any questions or need assistance, we are happy to help you. Please, contact your personal InLoox sales representative, whose contact information is in the confirmation email you received from us.

InLoox now! Web App: overview

When you try out InLoox now! you start in InLoox now! Web App. You can work in InLoox now! Web App in your preferred browser on your desktop, laptop, smartphone or tablet. Here is an overview of the most important features of InLoox now! Web App:
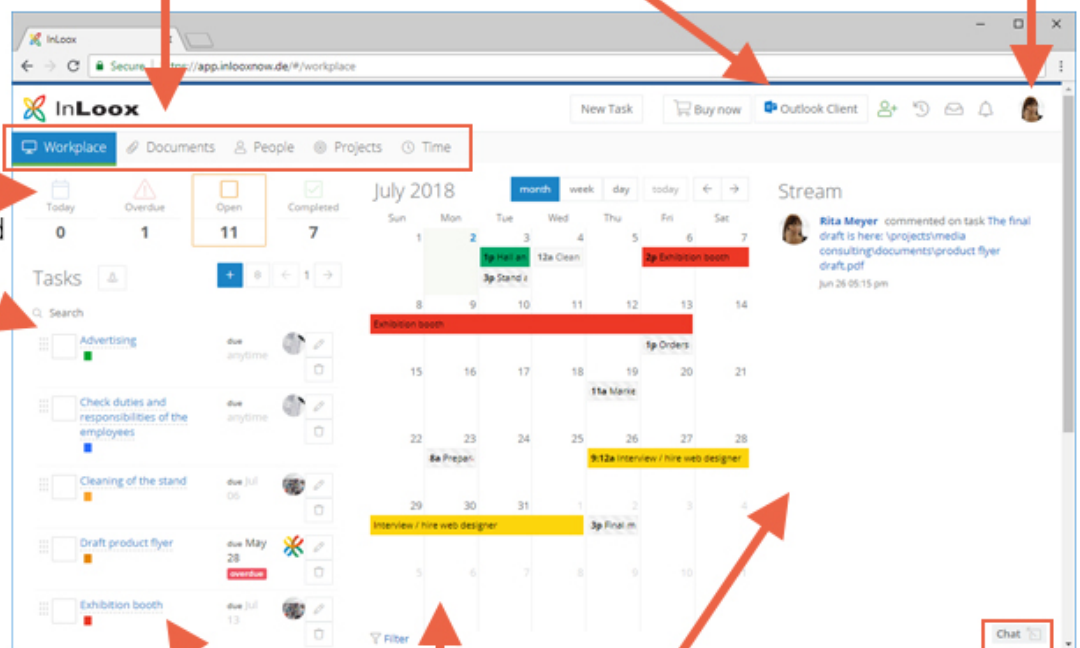
Next to the **Workplace**, the ribbon shows you the multi-project management areas. In Advanced Mode, you can access **Time** and **Insights**, too.

Download the **Outlook-Client** exe-file here.

Click on your profile image to access your **Profile**, change your **Password**, access the **InLoox Options** and change the **account**.

Tasks are grouped by their status and displayed in the task list.

Create a new task by clicking 🔹 or hitting the **New Task** button in the ribbon.

Tasks with your own personal & project-related tasks.
Calendar with project milestones and project tasks.
Stream with chat messages and project notes.

Use the **Chat** to communicate with colleagues & send pictures and documents.

Generally, we distinguish between the features you use for multi-project and task management, where you see all relevant data from every project you have a role in and every personal task (not assigned to a project), and single-project management functionalities where you work on one specific project. You start in the **Workplace**, which is an overview of your assigned tasks, your schedule and messages.

Use the ribbon to navigate in InLoox now! Web App.

You can switch between **Simple Mode** and **Advanced Mode** to display further features such as **Time** and **Insights**, and **Budgets** in a project. Click on your name in the upper right-hand corner to switch between these two modes.

In the ribbon, click on **Projects**. There you find three demo-projects in the project list. Click [+] to create a new project.

Each project has a **Manage** page, where you enter all relevant details, e.g. **Status**, **Start** and **End** date, the **Division** or **Customer**.

Navigate within the project to **Tasks**, **Documents**, **Lists**, **Time** entries, **Planning** and **Budgets**. They contain only data from this project.

On the right, you see this project's **Notes**, the **History** displays all changes to this project. **Custom Fields** have to be defined in the options first.

Add colleagues to your project by clicking [+] and assigning them a role, e.g. **Team**.

If you create the project, you are the **Manager**. You can assign another user to this role.
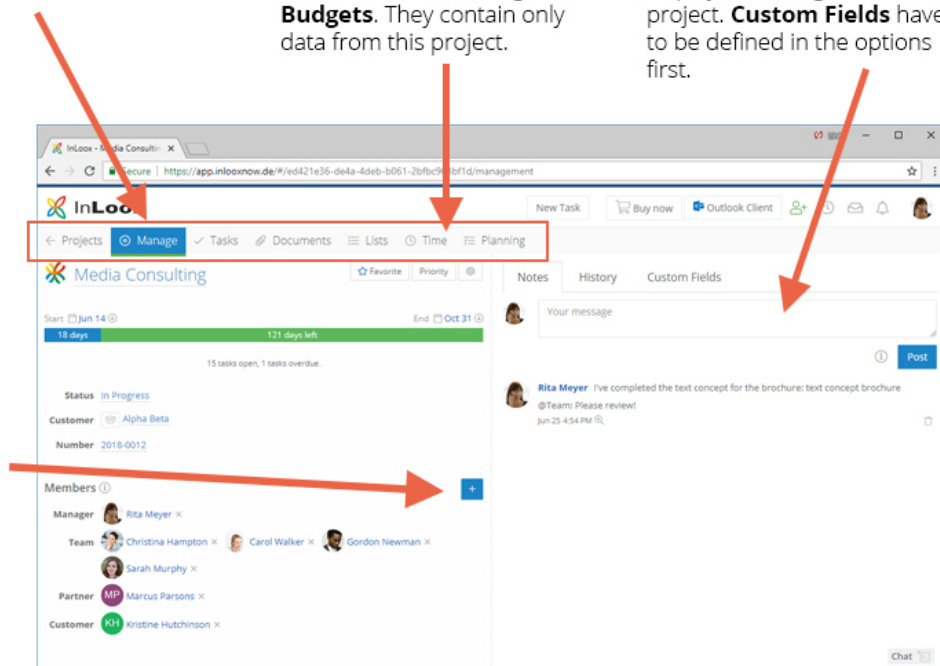
You find more detailed descriptions of all the features of InLoox Web App on our Website.

InLoox now! Web App: open the options

If you created the InLoox now! trial account, you are automatically given administrator permissions. This means, you can access the settings and customize certain functions or give and restrict user and role based permissions.

1. Click on your profile photo in the upper right-hand corner of InLoox now! Web App.
2. Click on **Options**.
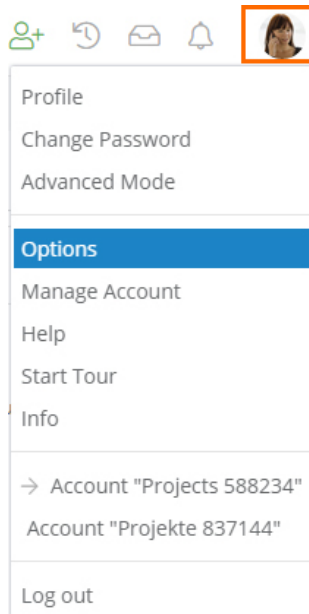
3. Now, you can navigate through the options.

Invite work colleagues to your InLoox now! account

During the 30-day trial of InLoox now! you can try it with up to 4 other users. All you have to do is invite them to your InLoox now! account. This is easily done in InLoox now! Web App.

1. In the top bar, click on the invite-symbol .

2. Enter the **email address** of the person you want to invite and select the **language** of the invitation email. (English or German).
3. Confirm by clicking on the blue checkmark .
4. The invited person receives the invitation email that includes a link to your InLoox now! Web App account. After clicking on this link, they enter their email address and choose their own password.
5. Now you can all collaborate on your projects in InLoox now! Web App.

**IMPORTANT:** If your colleagues have already created their own InLoox now! trial accounts, they need to make sure to login to the same InLoox now! trial account. Each account has a unique name that is a default number and is found in the InLoox now! Web App **Options**, section **General/Miscellaneous**. There you find your **Account name**, which you can change. Let your colleagues know, which account they need to choose.

Use InLoox now! for Outlook

With InLoox now!, you can also access your project data via our Outlook-add-on. After creating the InLoox now! account, you are automatically redirected to InLoox now! Web App where you can download the **Outlook Client**.

1. Click on **Outlook Client** in the upper right-hand corner. The InLoox now! for Outlook file (an .exe file) will download.
2. Double click on the .exe-file and then confirm to run the file.
3. Accept the service agreement for InLoox now! and click on **Install**.

4. This can take a moment. **Please, make sure, Microsoft Outlook is closed.**
5. After the setup is completed, click on **Start**. Microsoft Outlook will open automatically.
6. InLoox now! already contains three demo-projects which are shown in the project list.

7. Click on **Projects** in the lower left-hand corner of Outlook or click on the tab **InLoox now** in the ribbon to access your InLoox now! project data.

InLoox now! for Outlook: overview

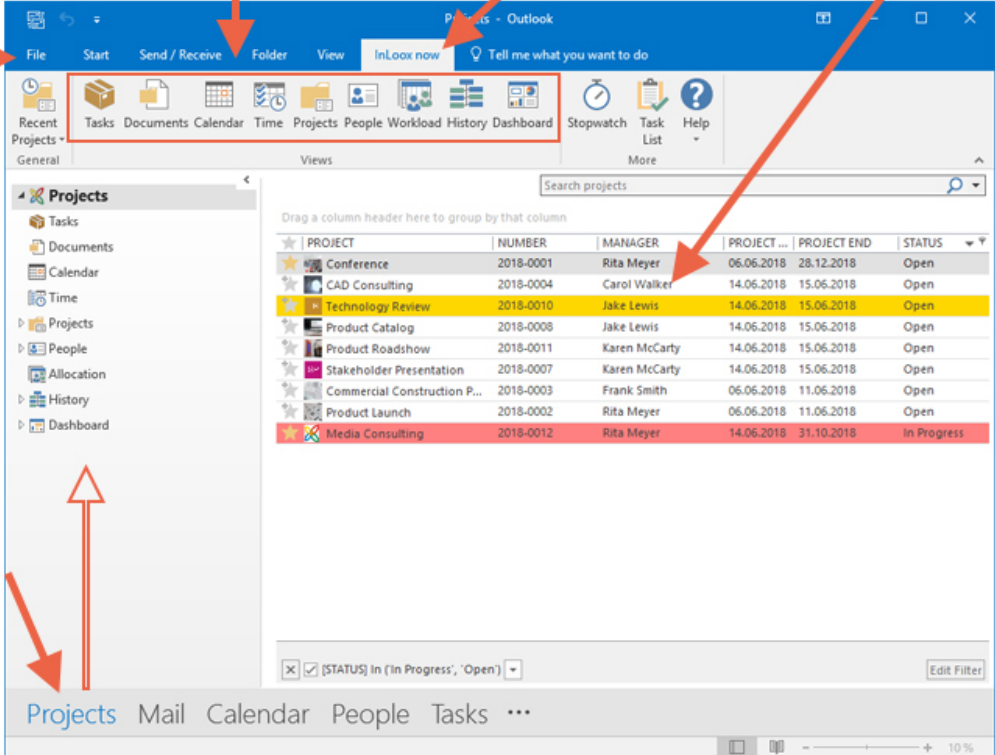InLoox now! for Outlook offers the same features as InLoox now! Web App plus the **Mind Map** feature.

These are your multi-project features: **Tasks**, **Documents**, **Calendar**, **Time**, **Projects**, **Workload**, **History**, and **Dashboard** contain data from all your projects for which you at least have reading permissions.

The **InLoox now** tab is added to your Outlook after the installation of the InLoox now! for Outlook exe-file.

Double-click on a project to open it in a seperate window.

Click on **File** to access the **InLoox now! Options**.

After the installation of InLoox now! for Outlook, **Projects** 🔹 is added to the navigation bar at the bottom of Microsoft Outlook. Click on it to open the InLoox now! navigation bar on the left.

Generally, we distinguish between two kinds of functionalities: those for multi-project and task management, and the ones for single-project management, where you only work in one project.

Multi-project features show you data from all the projects you have a role in and, thus, have at least reading permissions. **Tasks**, **Documents**, **Calendar**, **Time**, **Resources**, **History** and **Dashboards** show you multi-project data. So, if you are a team member in four different projects and a project leader in two further projects, your project list contains six projects.

When you create a new project, you start on the **Management** page where you enter all relevant details such as **Name**, **Staff** assigned to this project or **Start** and **End** date of the project.

Navigate to the project's **Lists**, **Mind Maps**, **Tasks**, **Planning**, **Time** entries, **Documents**, or **Budgets** and the **Budget Overview**.

Post **Notes** to share information about this project. Use the **Notify** feature to alert e.g. the proejct **Team** or **Manager** specifically.

When you create a new project, you are assigned the role of **Project Manager**.

You can assign someone else this role and assign other InLoox users roles in this project.

The day you create the project is automatically taken for the start date. You can change that.
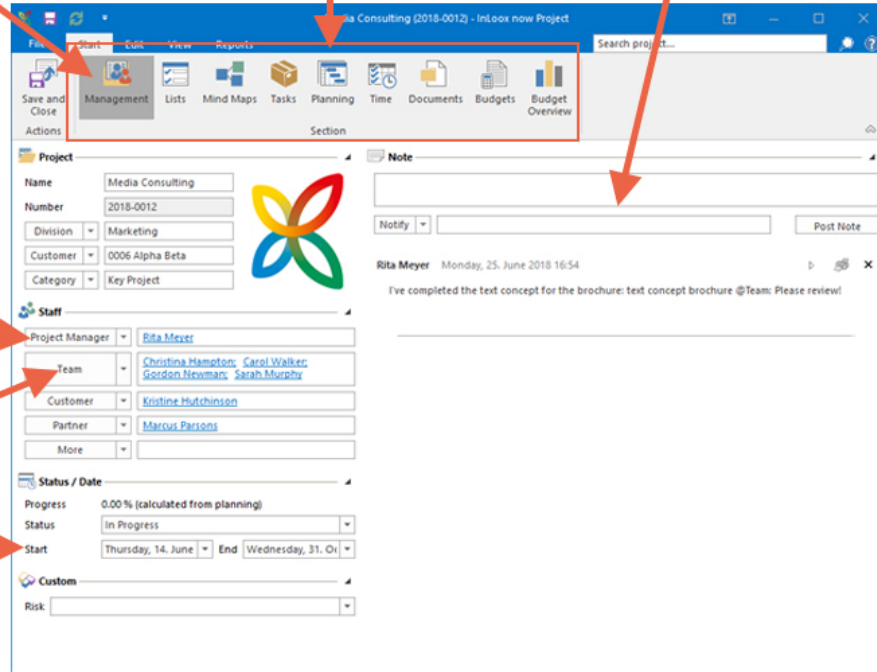
When you create a new project, or open an existing project, you are directed to this project's **Management** site. There, you enter all relevant project details such as **Name**, **Start** and **End** date and assign your work colleagues to the available project roles. Only the project's name is a mandatory field.

Then you can start planning your project or creating your project's tasks. Alternatively, you can also start with a mind map.

The Outlook-integration of InLoox enables you to use your emails, calendar dates or meeting-requests and your contacts for your task and project management in InLoox:

When you have installed InLoox now! for Outlook, your Outlook is enhanced with very practical InLoox features: you can quickly access **Recent Projects**, **Create** a **Task** e.g. from an email, **Save** an **Email** as a document or **Track Time** you spent working on a specific project task.
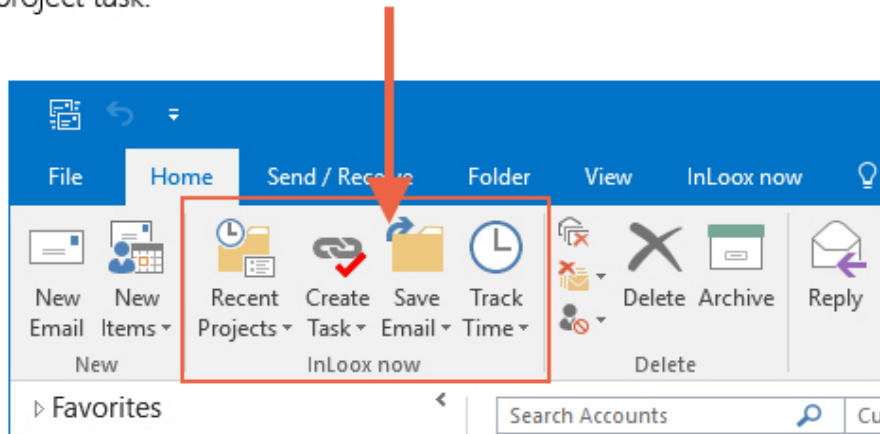
You can create a task from your Outlook email. Simply click on the email and then click on **Create Task** in the ribbon. Either assign the task to a project or create a personal **free task**, that is not assigned to a specific project.

For further details on how the Outlook integration makes your daily work and project management a lot easier, please refer to our online help.
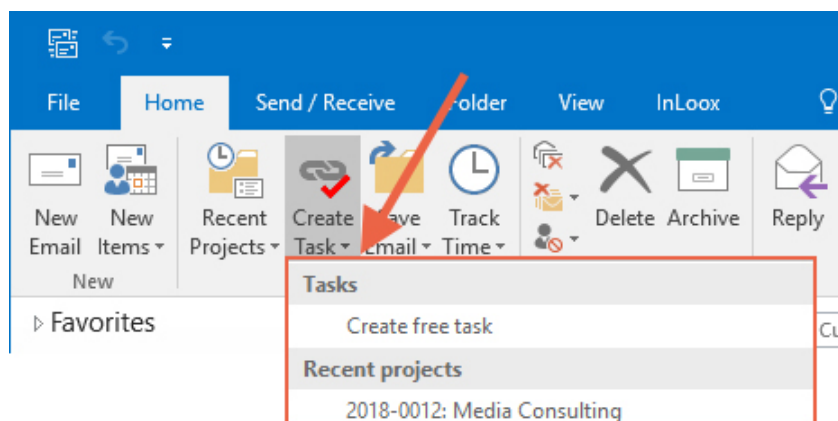
InLoox now! for Outlook: open the options

After you have successfully installed the Outlook-Client, click on **File** and then on **Options** to open the InLoox now! for Outlook options. There you can change the language, display and system settings. <u>You can only access the InLoox now! options if you are the admin of the account!</u>
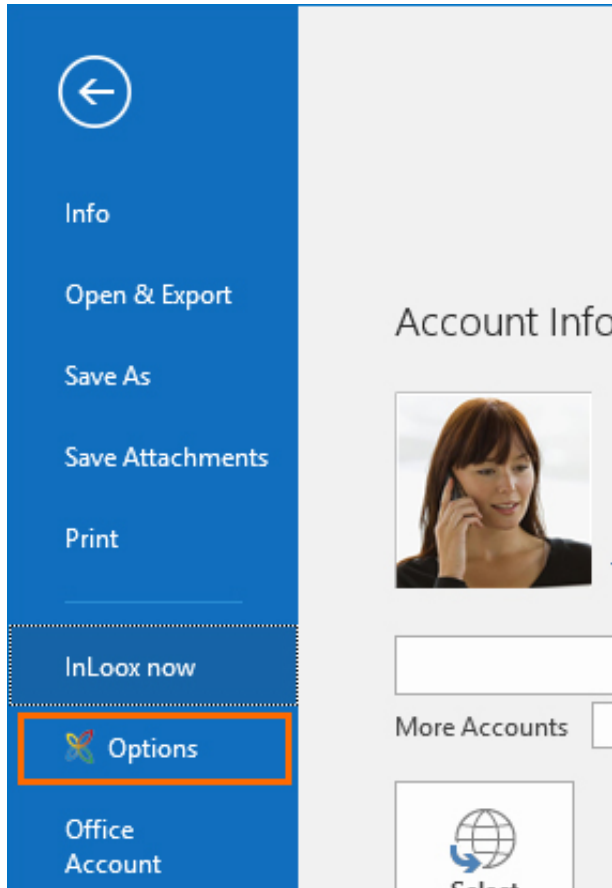
How to invite colleagues via InLoox now! for Outlook.

When you work in InLoox now! for Outlook you can also invite your colleagues from here to collaborate on your projects in InLoox now!. During your 30-day trial, you may invite up to 4 more people.

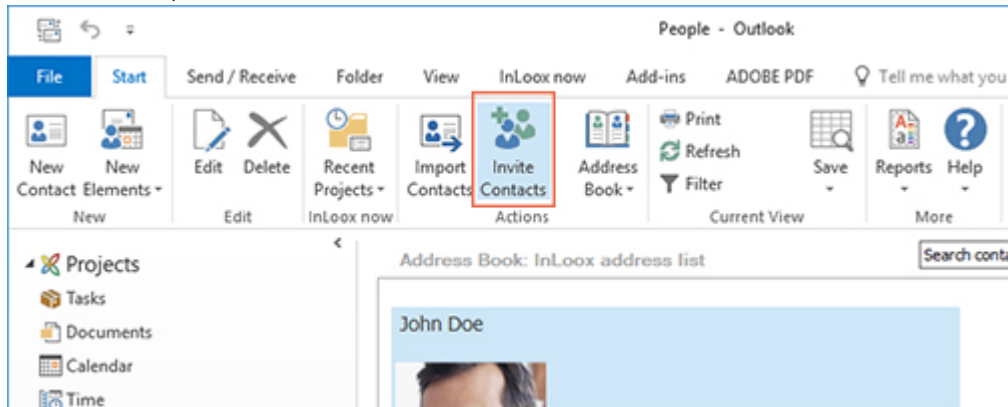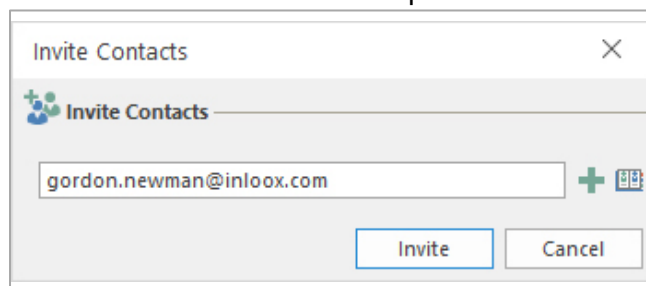1. In Outlook, click on the **InLoox now** tab and then on **People**.
2. In the ribbon, click on **Invite Contacts**.

3. A new window opens where you enter the invitee's email address and click **Invite** to send an invitation email to this person.

4. Alternatively, you may click on the address book symbol [icon] and select a person from your address book or e.g. from your Microsoft Exchange addresses.
5. The invited person receives an invitation email with a link to your InLoox now! account.

How to set permissions

If you have created the InLoox now! trial account, you are the admin and can access the InLoox now! options. This is where you can manage the up to 4 additional users and set the user based and role based permissions.

We advise you to give every user all the permissions during your trial. That way, every user can use and access every feature of InLoox now! and can fully evaluate InLoox's capabilities.

You can do this either in InLoox now! Web App or in InLoox now! for Outlook.

Setting permissions in InLoox now! Web App
1. Make sure you've invited your colleagues to your InLoox now! account. You can only set permissions for invited users.
2. Open the InLoox now! options by clicking on your profile photo and then on **Options**.

8. To set the new user's permissions, select **Permissions**. There you set the **user based** and **role based permissions**.
9. Click on **User based**. You will now only see yourself.
10. Click on the InLoox icon next to **Add Contact** and select a user.
11. Click on the small arrow next to the name and set this person's reading or editing permissions. If you click on **Select All**, you activate every user based permission including admin permissions. If you do that, this person can also access the options and change settings.
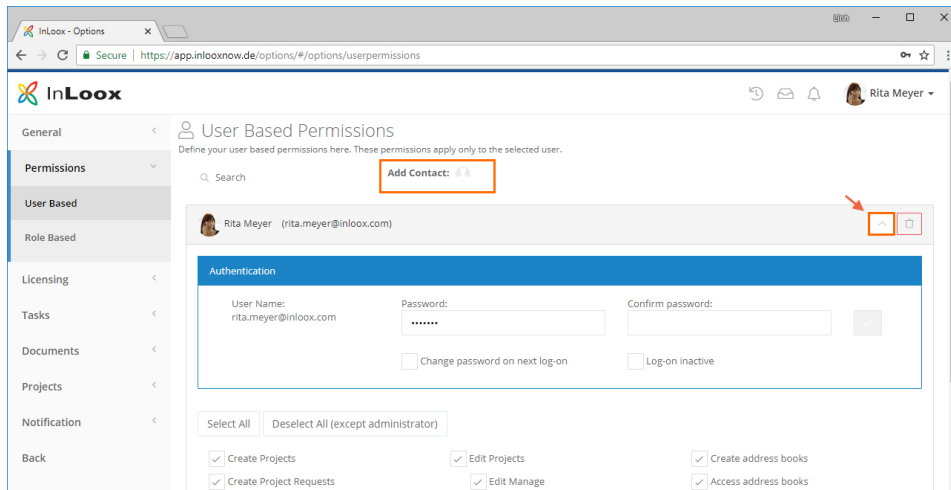
Setting permission in InLoox now! for Outlook

1. Open Microsoft Outlook, click on **File** and then click on the I**nLoox options**
2. The window **Options** opens. On the left, select *Permissions* and then click on **New**. In the window **Permissions**, click on the arrow to select InLoox now user.

3. In the window *Address book*, select the user you have added before. Confirm by clicking **OK**.

8. Finally, select the permissions you want this user to have. If you tick the top box *Permission*, each permission is activated. During your trial,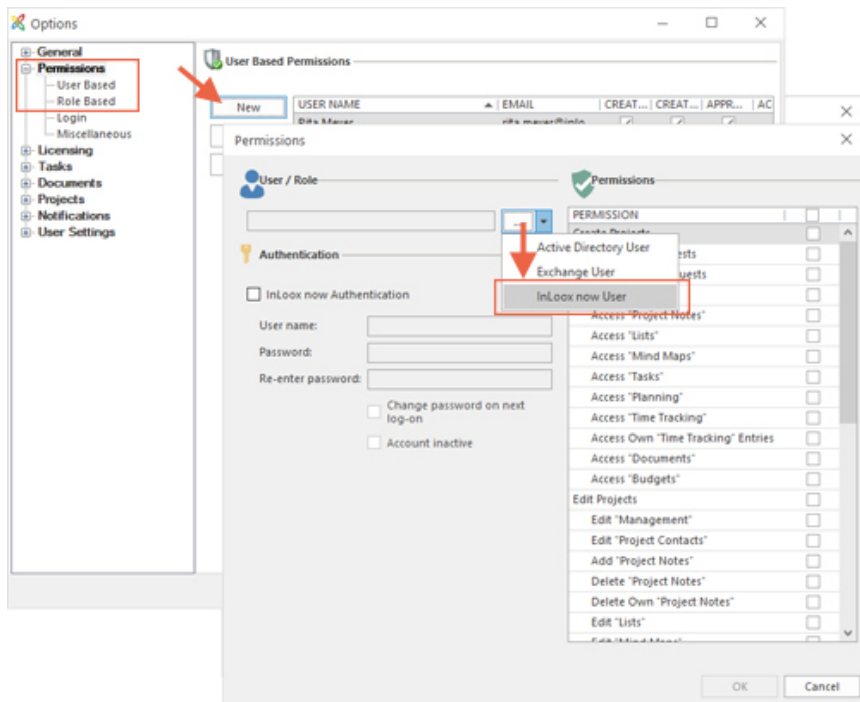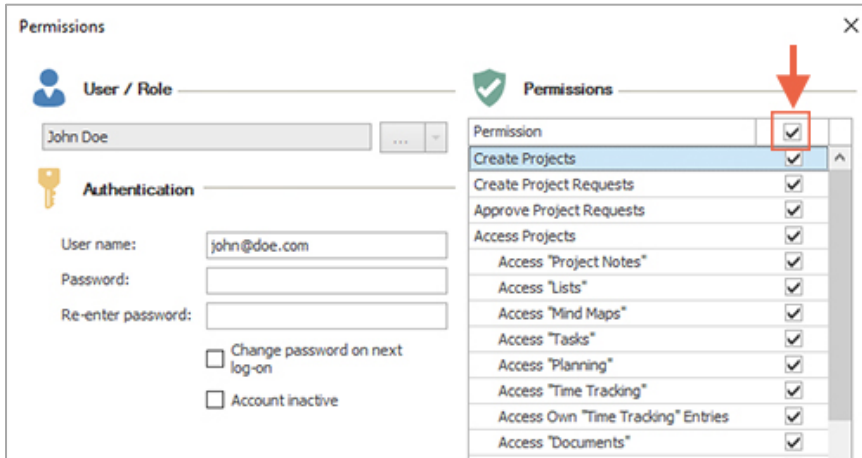 we advise you to give every user all the permissions so that each person can evaluate the full set of features InLoox offers.

Difference between user based and role based permissions

User based permissions are set for each of the InLoox now! users separately. These permissions are valid for this person for every project. This way, you can deny users access to certain features altogether, e.g. prevent them from seeing *Budgets* or *Time*. You can also only grant users reading permissions, so that they are not able to edit tasks or project data.

Role based permissions are acquired by users when they assume one of the following roles in a project:

- Manager
- Team
- Partner
- Customer
- More
- Reviewer (only for project proposals)

These roles have certain permissions that are valid for every project of your InLoox now! account. Users acquire these permissions as soon as they are added to a project and assume this role. These permissions define which reading and editing permissions this user has in this project alone. If a user has more than one role, the permissions of each role are added and together apply for this user in this project.

Generally, InLoox now! combines user based and role based permissions. The following example of Max Schiller, who works in accounting, illustrates that:

- The role "Team" has the permission to "edit projects" including "add project notes", "edit lists", "edit mind maps", and "edit tasks".
- The InLoox now! user Max Schiller is permitted to only "read projects" and to only "read and edit budgets".
- The user Max Schiller has been added to the project *Product Development* in the role of "Team".

- There are three more projects in progress, but the user Max Schiller is <u>not involved</u> in any of them.

According to this set of role based and user based permissions, the following is true for Max Schiller:

- Max Schiller may read <u>and</u> edit the project *Product Development*, <u>including</u> adding project notes and editing lists, mind maps, and tasks.
- Additionally, he may read <u>and</u> edit the budget in the project *Product Development*.
- Max Schiller may do this in every other project where he is added in the role of "Team".
- Max Schiller is, however, <u>not permitted</u> to edit anything other than the budgets in the three other projects where he is <u>not added</u> in the role of *Team*. He may only read these projects, as his user permission allows him only to do that and prevents him from editing any project data other than budgets.

For more details on user based and role based permissions, please, refer to our <u>online help</u> on our website.

> If you have any further questions, need assistance or want to schedule a free online demo, please, contact us. We are happy to help you.
>
> Please, contact your personal InLoox sales representative. You find the contact details in the confirmation email you received after you created your InLoox now! trial account.
>
> Alternatively, you may reach us by email <u>office.sf@inloox.com</u>.
>
> Should you need technical assistance, please, go to our website to send us a <u>support ticket</u>.