InLoox PM 7

User Manual

Published: July 2013

You can find up-to-date information at http://www.inloox.com

Contents

Support and contact

Contact the InLoox PM support

Thank you for choosing **InLoox PM** - **the Project Management Software integrated in Microsoft Outlook and the Web**!

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.

As a customer of InLoox, your are entitled to benefit from InLoox' direct service and support.

NOTE Please have your customer number to hand.

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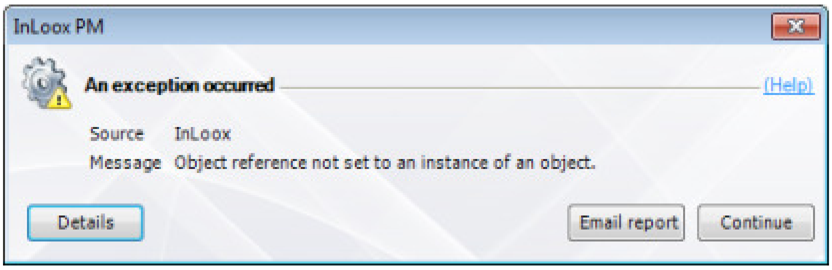
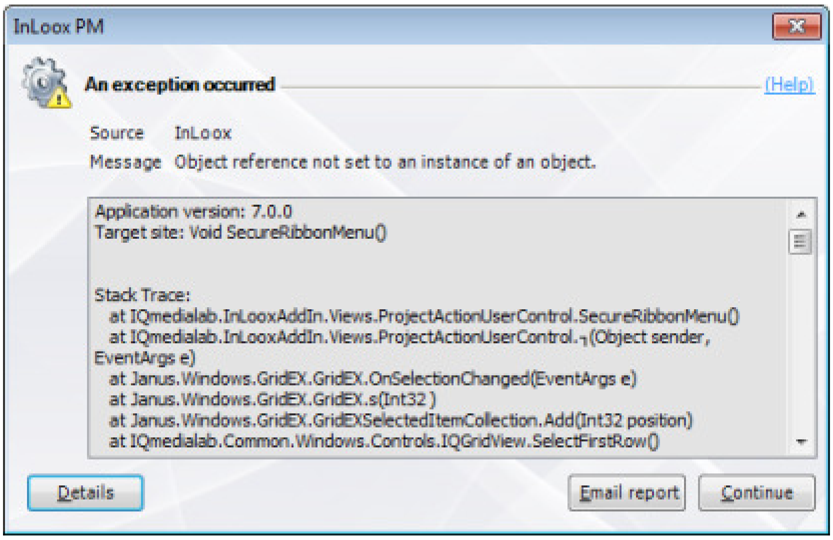
Handle exceptions

There are certain rare configurations that can cause an unpredictable behavior of the software. To cater for this we have developed a special message dialog box which permits a more accurate examination of the problem. If such an exception occurs in your installation, there are various ways to inform us about it. These options are described below.

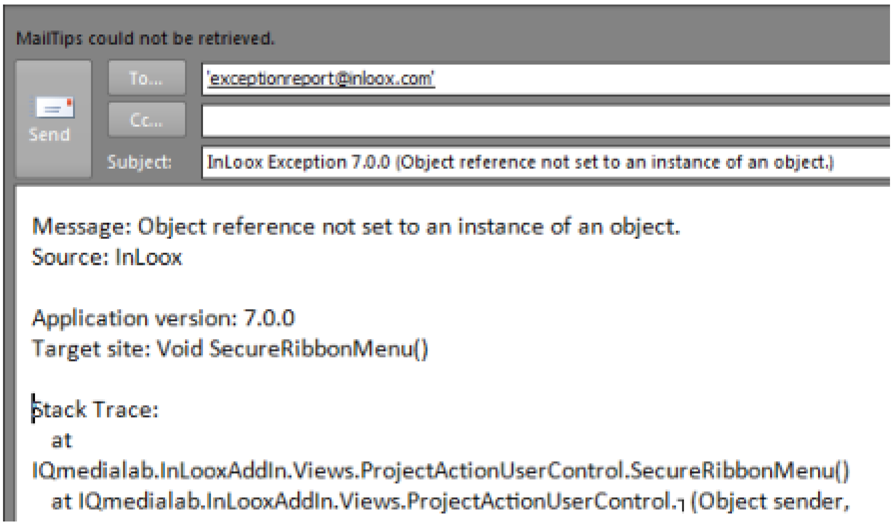
1. The InLoox PM dialog box for exception handling is displayed:



2. This dialog box allows our developers to localize an unpredicted condition more precisely and make future versions of InLoox more stable. Click **Details** in the dialog box.



3. All the exception data that the system has compiled are displayed.
4. Click 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 contact you directly and to solve the exception in direct collaboration with you.
   This information is sent to our technical staff:



TIP You can, of course, also contact our support directly in the usual way. Please make sure to have the contents of the exception dialog box to hand. For more information on how to contact the InLoox support team, please see Contact the InLoox PM support.

Error messages

Below, you find a list of InLoox PM error messages and proposed solutions.
If you cannot solve the problem on your own, please do not hesitate to contact our support service, who can be reached online at http://www.inloox.com/support/

Article content

Errors in connection with the database

Error message	Solution
Error: The InLoox PM database is not available. Error on establishing link with the server...	• Check that the network is accessible. • Check whether the offline configuration, if there is any, is correct. • Contact your system administrator.

You are using InLoox PM client version X.X. The InLoox PM database version is Y.Y. Please ensure that you are using the appropriate version of the product or contact your system administrator.	The InLoox PM client version being used does not match the database version on the server. Please update the InLoox PM client.

Errors in connection with licenses

Error message	**Solution**
The license code input does not tally with version of InLoox PM being used.	The license code you have put in is for an earlier or later version of InLoox PM.
A licencing error has occurred. Please check the licence key or refer to your system administrator.	The license key you have put in is not valid for the installed version of InLoox PM. Please request a valid license key.
The maximum number of clients has been reached. It is not possible to use InLoox PM. Please check the licence key or refer to your system administrator.	Your InLoox PM 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.

TIP For more information on InLoox PM licensing, please see Read the InLoox PM license terms.

Errors in connection with reports

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 the help documentation for the InLoox PM 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. For more information, please see the chapter Manage report templates and the help documentation for the InLoox PM report designer.
No printer is installed. Please install a printer to output reports.	A printer must be installed to put out a report. Please install the driver needed by your printer. For more information, please have a look at the user manual for your printer.

Rate InLoox PM

1. On the **InLoox PM** tab, in the **Extras** group, click the **Arrow** below **Help**.
   NOTE In Outlook 2003/2007, click the **Arrow** in the **InLoox PM Toolbar**.
2. Choose **Rate InLoox PM** from the drop-down list.
3. In the opened dialog box, set up the number of stars by clicking on them.
4. In the **Comment** box write a comment, if you like to.

5. Click **OK**.
   The feedback now is sent directly to the InLoox PM product development.

Recommend InLoox PM

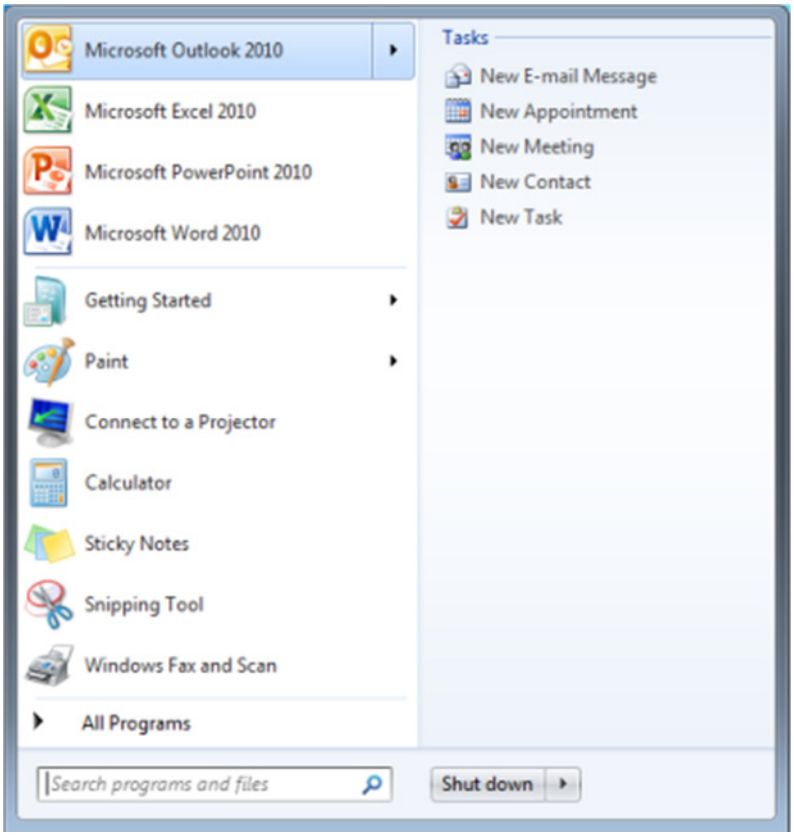
Would you like to recommend InLoox PM to you partners, suppliers or friends? Therefore, you can use the **Recommend InLoox** dialog box.

1. On the **InLoox PM** tab, in the **Extras** group, click the **Arrow** below **Help**.
   NOTE In Outlook 2003/2007, click the **Arrow** in the **InLoox PM Toolbar**.
2. Choose **Recommend InLoox PM** from the drop-down list.
3. On the **Recommend InLoox PM** dialog box, click **Add**.
4. On the **Choose Resource** dialog box, choose the contacts from your Outlook or InLoox PM address book you want to recommend InLoox PM to.
5. Usually, you will be offered a standardized text. You can change this text.
6. Click **OK**.
   InLoox PM will be recommended via email.

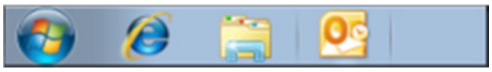
Getting started with InLoox PM

Welcome to InLoox PM! Here, you can learn how to start your first project with InLoox PM.

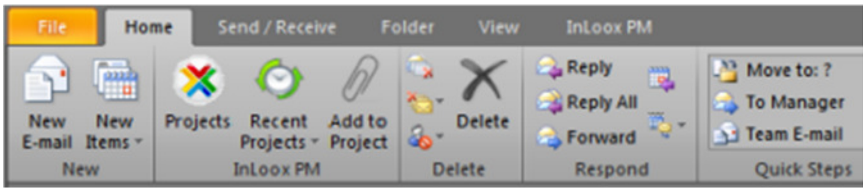
1. First, open Microsoft Outlook from **Start, Programs** ...



... or from your taskbar

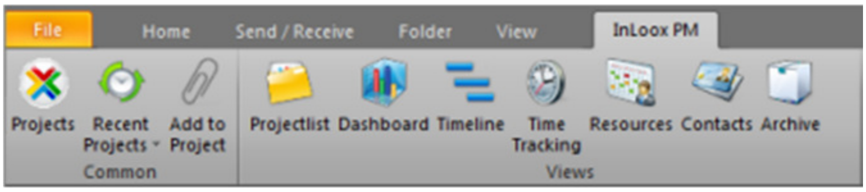


2. InLoox PM is integrated directly into Microsoft Outlook and is always available with one click.

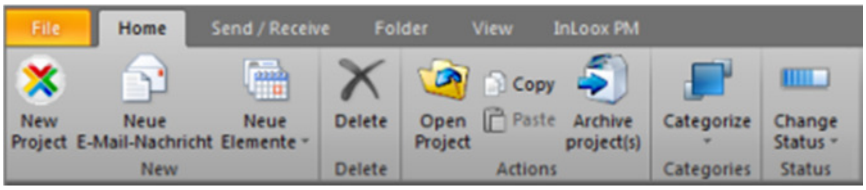


Open InLoox PM by clicking the **InLoox PM** tab in the **Outlook Ribbon**.

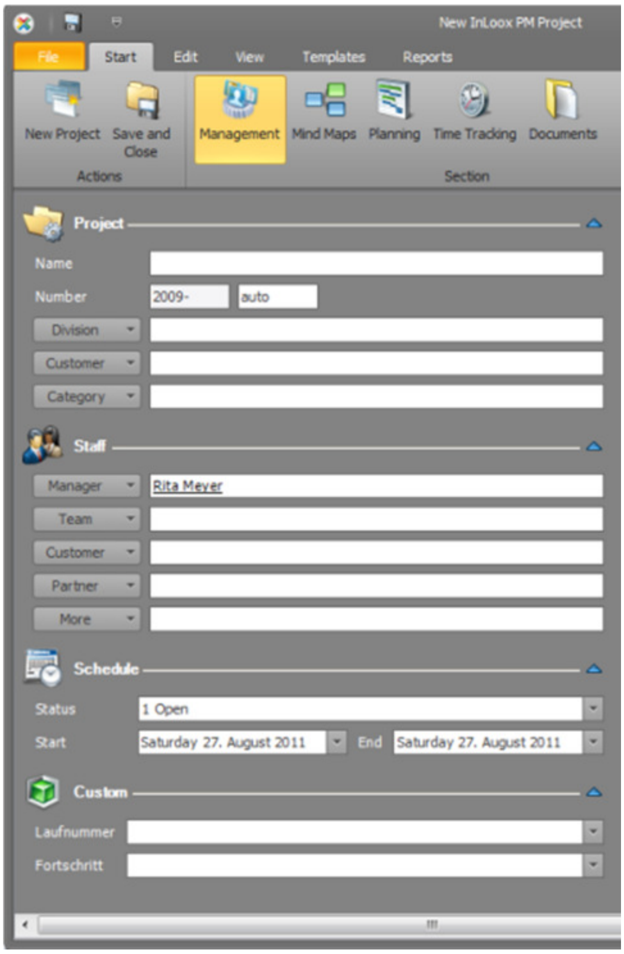
3. Then, click **Projects** in the **Common** group on the **InLoox PM** Ribbon.



4. Click **New Project** in the **New** group to enter the basic data for your first project with InLoox.



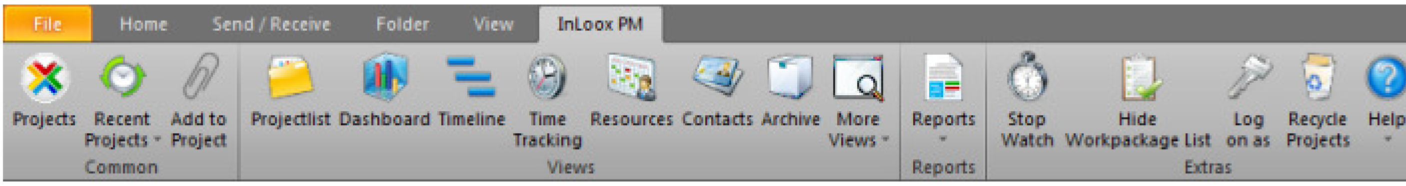
5. Complete the displayed Management form with your project data.



Ribbon/Toolbar

Work with the InLoox PM Ribbon

Click the **InLoox PM** tab in Outlook to display the **InLoox PM Ribbon**.The InLoox PM Ribbon is designed to help you to quickly find the commands and views you need to handle your projects. Commands are organized in a way that you can quickly switch between different views and features.



On the InLoox PM Ribbon you will find the following commands and views:

- **Recent projects** displays a list of the projects you opened recently, organized by the project numbers. InLoox PM saves ten projects maximum in this view. Click one item to open a project.
- **Add to project** Add Outlook elements such as emails. tasks or calendar entries to a project.
- TIP More information can be found under Add Outlook elements to InLoox PM.
- **Projectlist** switches to the project list overview in the InLoox PM folder. This folder is comparable with an email, calendar, or task folder of Outlook. The InLoox PM folder can be located on the network server or on your own hard disk, depending on the installed version.

  TIP More information can be found under the category Project list.
- **Dashboard** The Dashboard view shows selected basic data all of your projects.

  TIP More information can be found under the category Dashboard view.
- **Timeline** During the planning of multiple projects that run parallely, InLoox PM supports you with the timeline view.

  TIP You can also adjust the timeline view according to your individual requirements. More information can be found under the category Timeline view.
- **Time tracking** This view shows an overview of all project working times system-wide which you are allowed to access.

  TIP More information can be found under the Time tracking view.
- **Resources** The visual resource overview displays the resource capability and work load. It integrates both project work packages from InLoox PM and appointments from the Microsoft Exchange free/busy service.

  TIP More information can be found under the category Resources.
- **Contacts** InLoox PM contacts contain information such as emails addresses, postal addresses or different telephone numbers of the team members even if they are not available as an Outlook or Exchange contacts.

  TIP More information can be found under the category InLoox PM contacts.
- **Archive** This overview shows you all archived projects.

  TIP More information can be found under the category Project archive.
- **More views** Here, you find a list of different views of the project list. You can also save new views or manage the existing ones. Choose whether you want to make it visible for all users or only for yourself.

  TIP More information can be found under Search and find projects.
- **Reports** With the push of a button, the report designer issues reports such as project summaries, budget lists, expense reports and plan/actual comparisons in a variety of file formats like Microsoft Excel, Microsoft Word, HTML, PDF and many more. You can customize your personal report by data filtering.

  TIP More information can be found under the category Reports.
- **Stop watch** InLoox provides you with this feature to record simply all your working times that you spend on project workpackages. Start the stop watch when you start to work on a project-related task. When you are done, you can stop the stop watch and post the working time effort directly to the respective project.

  TIP More information can be found under Record personal time efforts with the stop watch.

- **Show workpackage list** displays your personal work package overview. All open workpackages are generated from the project plan.
  TIP More information can be found under category Workpackages.
- **Log on as** InLoox PM enables the external project partners, which don't have Windows user account in the corporate network, to logon to InLoox PM. As an InLoox PM user, you can choose between Windows and InLoox Authentication.
  TIP More information can be found under Create an InLoox PM account and Log on as InLoox PM user.
- **Recycle projects** The recycle bin contains an overview of the deleted projects. When you delete the projects from the project list, the projects are placed in the recycle bin.
  TIP More information can be found under View, restore, or delete projects in the recycle projects view.
- **Help** Click **Help** to get help information and find useful topics on how to manage and optimize InLoox PM. The InLoox PM help provides you with further information and tips on how to edit projects. You can either browse or search for help topics and index entries by using the InLoox PM help navigation pane.

Work with the InLoox PM Toolbar

In Outlook 2003/2007, you find the **InLoox PM Toolbar**. The InLoox PM Toolbar is always accessible and provides the following commands:

- **InLoox PM Folder** switches to the InLoox PM projectlist in the InLoox PM folder. The InLoox PM folder is comparable with an email, calendar or task folder. The InLoox PM folder can be located on the network server or on your own hard disk, depending on the installed version.
  TIP More information can be found under the category Project list.
- **Recent projects** displays the list of the projects you recently opened, organized by numbers. InLoox PM saves a maximum of ten projects in this view. Click one item to open the related project.
- **Current View** provides you with a list of different views of the project list. You can also save new views or manage the existing ones. Choose whether you want to make it visible for all users or only for yourself.
  TIP More information can be found under Generate personalized views.
- **Add to project** Add Outlook elements such as emails. tasks or calendar entries to a project.
  TIP More information can be found under Add Outlook elements to InLoox PM.
- **Reports** The report designer issues reports such as project summaries, budget lists, expense reports and plan/actual comparisons in a variety of file formats like Microsoft Excel, Microsoft Word, HTML, PDF and many more. You can customize your personal report by data filtering.
  TIP More information can be found under the category Reports.
- **Tools** provides you with the following additional features:
  - **Resource overview** The visual resource overview displays the resource capability and work load. It integrates both project work packages from InLoox PM and appointments from the Microsoft Exchange free/busy service.
    TIP More information can be found under the category Resource overview.

- **Language** InLoox PM is multilingual. Choose between different languages in the list.
  TIP More information can be found under Change the language.
- **Logon as** InLoox PM enables external project partners, who do not have a Windows user account in the corporate network, to logon to InLoox PM. As an InLoox PM user, you can choose between Windows and InLoox PM Authentication.
  TIP More information can be found under Create an InLoox PM account and Log on as InLoox PM user.
- **Recycle projects** The recycle bin contains the overview of the deleted projects. When you delete a project from the project list, the projects are placed in the recycle bin.
  TIP More information can be found under View, restore, or delete projects in the recycle projects view.
- **Backup database** With this feature, you can back up the database to protect your project information against data loss.
  TIP More information can be found under Backup the project data.
- **InLoox PM Options** With the InLoox PM options, you can customize the settings and features for displaying, administrating and editing projects.

- You can find the following buttons in this list under : **InLoox PM help**, **InLoox PM online**, **Make a suggestion**, **Recommend InLoox PM**, **Rate InLoox PM**, **Report a bug** and **About InLoox PM**.

Project list

Create a project

1. Click **Projects** on the **Outlook Ribbon** to switch to the list of all available projects in InLoox PM.

Project name	Number	Manager	Customer name
LWN Sales Represent	2009-0001	Rita Meyer	SAPT Ltd.
Tradeshow	2009-0003	Rita Meyer	SAPT Ltd.
Resource Collection	2009-0004	Rita Meyer	Intern
Media Consulting	2009-0010	Gordon Newman	Glog plc
Product Release	2009-0012	Rita Meyer	PhoneMe Ltd.

NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Click **New Project** or double-click on an empty field in the project list.

   Keyboard shortcut Press **F2** in the project list to create a new project in InLoox PM.

3. Enter a **project name** and further information on the project.

   As a creator, you will automatically be added as project manager.

   TIP The customer list contains the preselection of all companies that participate in an InLoox PM project. For more information see Assign a division, customer and category.

4. In the project, on the **Start** tab, click **Save and Close** after you entered all required information.

General features and printing of the project list

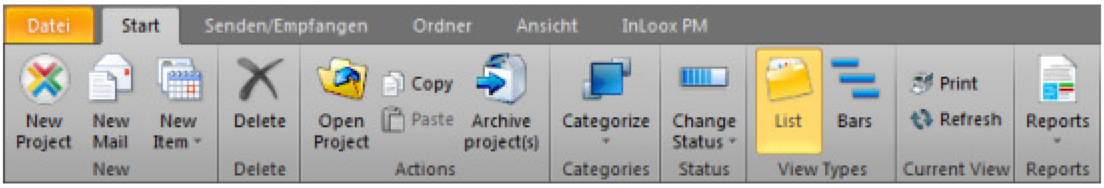
The InLoox PM project list provides you with various features that make project editing easier and faster. As a standard, you can see only those projects in the project list that are accessible for you.

Article content

Important features of the InLoox PM Ribbon

Click **Projects** 

on the Outlook Ribbon to switch to the InLoox PM project list. You will find the following features on the tab **Start**, in the **InLoox PM Ribbon**:



- **Create a new project** Click **New Project** in the **New** group to start a new project in InLoox PM.
- **Delete project** Remove the selected project with a click of the **Delete** button.

TIP For more information see Copy and delete projects.

- **Copy, paste and archive a project** These buttons are in the **Actions** group. Move a marked project via **Archive** to the InLoox PM archive.

TIP For more information see the category Project archive.

- **Categorize a project** In order to assign a category to one project (e.g. **circular project** or **new business**), click **Categorize** in the **Categories** group and choose one category in the context menu.

TIPS

- For more information see How to add further information in the status / date area.
- You can save or edit a new project status type in the InLoox PM options. See Change the project status for more information.

- **Change status** You can also change the status or the degree of completion of the selected project in the project list. Click **Change Status** and choose from the list the respective status, e.g. **started** or **completed**.

  TIPS

  - For more information see How to add further information in the status / date area.
  - You can save or edit a new project status type in the InLoox PM options. See Change the project status for more information.

- **Change view types** Choose between **List** and **Bars** view in the **View Types** group. The list view displays a real-time project information. With the bars view you have a timeline view to better coordinate multiple projects running parallel.

  TIP For more information see the Bars view.

- **RefreshRefreshCurrent ViewReports** You can **Create Reports** or view the **Saved Reports** in the project list by clicking **Reports**.

  TIP See Create a report and Manage the saved reports for more information.

Project list features

The following features can be found in the project list:

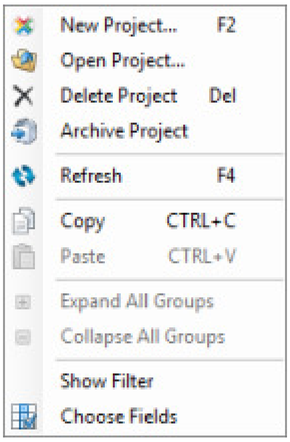
- **Open a project** Double-click on an empty space in the project list or right-click there to open the context menu and choose **New Project...** from the list.
- **Create a new project** Double-click on an empty space in the project list or right-click there to open the context menu and choose **New Project...** from the list.

  TIP For more information see Create a project.

- **Find quickly projects with the same initial letters** Press the respective letter on your keyboard and switch to another project with the same initial letters in the name.Features in the context menu

Features in the context menu

- The context menu provides you with almost all basic features that are also available on the InLoox Ribbon, such as **New Project...**, **Open Project...**, **Delete Project**, **Archive Project**, **Refresh**, **Copy** and **Paste.** It has also such features as **Expand** and **Collapse All Groups**, **Show Filter**. Right-click on one of the projects in the project list to open the context menu.



- **Choose Fields Choose Fields Customer**Reset the fields via Drag&Drop back into the dialog box.

  - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column headers.
  - Reset the fields via Drag&Drop back into the dialog box.

TIP For more information see <u>Create a view</u>.

Information rules in the project list

- The completed or cancelled projects are struck through and marked grey in the project list.
- The critical projects are marked with a red point.

Keyboard shortcut

- **F2** Create a new project.
- **F4** Refresh the project list.
- **CTRG+P** Print the project list.
- **CTRG+C** Copy a project into the clipboard.
- **CTRG+V** Paste a project from the clipboard to the project list.

Print in the project list

You can also print the project list. The procedure for printing is the same for dashboard, timeline, time tracking, contacts as well as for project pages - all printing settings and features can be found in the dialog box **Print**. Select the required settings and options in this box.

1. On the **Start** tab, in the InLoox PM Ribbon, click **Print** in the **Current View** group. The **Print** dialog box will be displayed.
2. Do one of the following:
   - Click **Settings** under **Choose a printer** to change paper size, output format or other settings.
   - If you want to specify individual pages or sets of pages to be printed, choose the required options in the **Page area**. Then click **Apply**.
3. Click **Print**.

NOTE Be sure that all needed changes are made before clicking **Print**. The document will be sent directly to the printer by clicking **Print**.

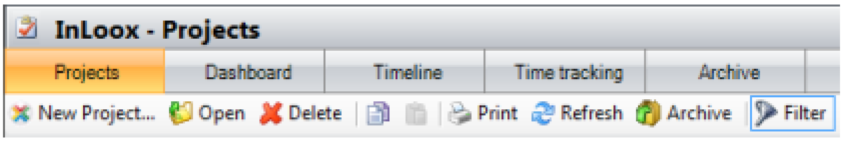
General features and printing of the project list in InLoox PM for Outlook 2003/2007

The InLoox PM project list provides you with various features that make project editing easier and faster. As a standard, you can see only those projects in the project list, to which you have an access.

Article content

Important features of the menu bar

Click **InLoox PM Folder** in the **InLoox PM Toolbar** to switch to the InLoox PM project list. You will find the following features in the menu bar:



- **Create a new project** Click **New Project** in the menu bar.
- **Delete project** Remove a selected project with by clicking the **Delete** button.
  TIP For more information see Copy and delete projects in Outlook 2003/2007.
- **Open a project** Click this button to see all related project information.
- **Copy and paste** You can copy and paste one project or several projects at the same time.
- **Archive a project** Move a marked project via **Archive** to the InLoox PM archive.
  TIP For more information see the category Project archive.
- **Refresh** Via the **Refresh** button, all changes will be updated and the view will be reloaded.
- **Filter** Show or hide the filter using this button.
  TIP For more information about this feature see Search and find projects.

Project list features

The following features can be found in the project list:

- **Open a project** Double-click on an empty space in the project list or right-click there to open the context menu and choose **New Project...** from the list.

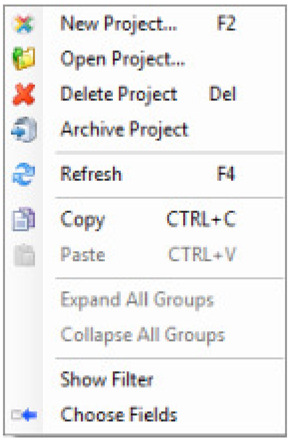
- **Create a new project** Double-click on an empty space in the project list or right-click there to open the context menu and choose **New Project...** from the list.

  TIP For more information see Create a project.

- **Find a project with the same initial letters quickly** Press the respective letter on your keyboard and switch to another project with the same initial letter.

Features in the context menu

- The context menu provides you with almost all basic features that are also available in the InLoox PM Toolbar, such as **New Project...**, **Open Project...**, **Delete Project**, **Archive Project**, **Refresh**, **Copy**, **Paste**, **Expand** and **Collapse All Groups** or **Show Filter**. Right-click on one of the projects in the project list to open the context menu.



  - **Choose Fields** This feature sorts and organizes the project list by the required data.
  - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the header columns.
  - Reset the fields per Drag&Drop back into the dialog box.

    TIP For more information see Create a view.

Information rules in the project list

- The completed or cancelled projects are struck through and marked grey in the project list.

Keyboard shortcut

- **F4** Create a new project.
- **F2** Refresh the project list.
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Print in the project list

You can also print the project view. The procedure for printing is the same for dashboard, timeline, time tracking, contacts as well as for project pages - all printing settings and features can be found in the dialog box **Print**. Select the required settings and options in this box.

1. In the menu bar click **Print**. The **Print** dialog box will be displayed.
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3. Click **Print**.

NOTE Be sure that all changes are made before clicking **Print**. The document will be sent directly to the printer by clicking **Print**.

Bars view

Adjust the bars view

InLoox PM provides you with the timeline view to get an overview of the temporal distribution of your projects.

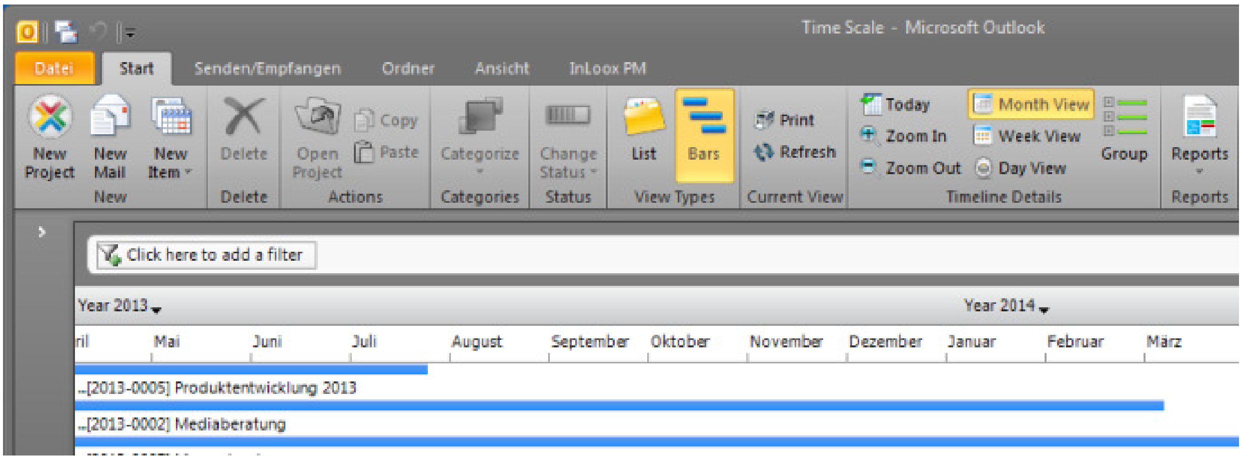
This article shows you how to adjust the timeline view.

Article content

Work with the bars view

1. In the project list, in the **Start** tab, in the **View Types** group, click **Bars**.

   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Timeline** in the InLoox PM project list.



2. Perform one or more of the following actions:

   - **Create a new project** Click **New Project** in the **New** group.
   - **Delete project** Remove a project by clicking the **Delete** button.

     TIP For more information, see Copy and delete projects.
   - **Open, copy and paste a project** These buttons can be found in the **Actions** group . The **Copy** and **Paste** features help to create projects quickly. You can modify them afterwards.
   - **Categorize a project** Choose a project from the Timeline overview and click **Categorize** in the **Categories** group. Choose from the drop-down list between **Recurring Project**, **Key Project** and **New Business**. Assign a category to a project without opening it.

     TIPS

     - To find out more about project categories, see Assign a division, customer and category.
     - You can also create your own category for the projects. For help, see the chapter Manage categories
   - **Change status** You can also change a status or a degree of completion of the selected project in the view. Click **Change Status** and choose from the list the respective status, e.g. **started** or **completed**..

     TIPS

     - For more information, see How to add further information in the status / date area.
     - You can save or edit a new project status type in the InLoox PM options. For more information see Change the project status.
   - **Print a timeline view** In the **Current View** group, click **Print** to start the quick print feature of the timeline view.

     TIP For more information about printing, see General features and print of the project list, in the **Print in the project list** area.

   - **Refresh** Via the **Refresh** button in the **Current View** group all changes will be updated and the view reloaded.
   - **Adjust the timeline view** In the **Timeline Details** group you will find the following features:
     - **Today** Switches to current date.
     - **Month view** Switches to month view.
     - **Week view** Switches to week view.

- **Day view** Switches to day view.
- **Zoom in or zoom out** Enlarge or reduce the time period of the timeline.

- **Group the projects** Group the projects by certain criteria such as a customer, priority, etc.

  TIP For more information see Group projects.

- **Issue a report** Optionally, you can also issue a report in this view by clicking **Reports** in the **Reports** group.

  TIP For more information about reports, see the category Reports.

Features in the timeline overview

The following features can be found in the timeline overview:

- **Open a projectOpenCreate a new project** Double-click on the empty space in the time line overview or right-click there to open the context menu and choose **New Project...** from the list.

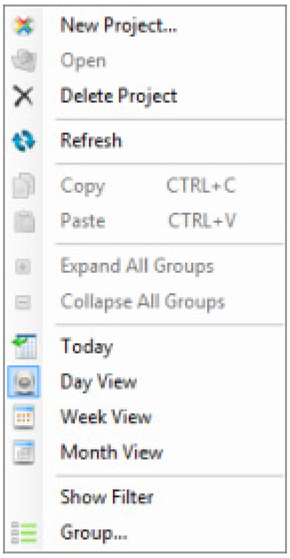
  TIP For more information see Create a project.

- **Search the projects** Type a text in the **search bar** to find quickly the respective information, also within a project.

  TIP For more information, see Search and find projects.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the InLoox PM Ribbon, such as **New Project...**, **Open**, **Delete Project**, **Refresh**, **Copy** and **Paste**, **Expand** and **Collapse All Groups**, **Show Filter**, **Group**. It has also provides the features **Today**, **Day View**, **Week View** and **Month View**. Right-click in the timeline to open the context menu.



Keyboard shortcut

- **F4** Create a new project.
- **F2** Refresh the project list.
- **CTRG+P** Print the project list.
- **CTRG+C** Copy a project into the clipboard.
- **CTRG+V** Paste a project from the clipboard to the project list.

Group projects

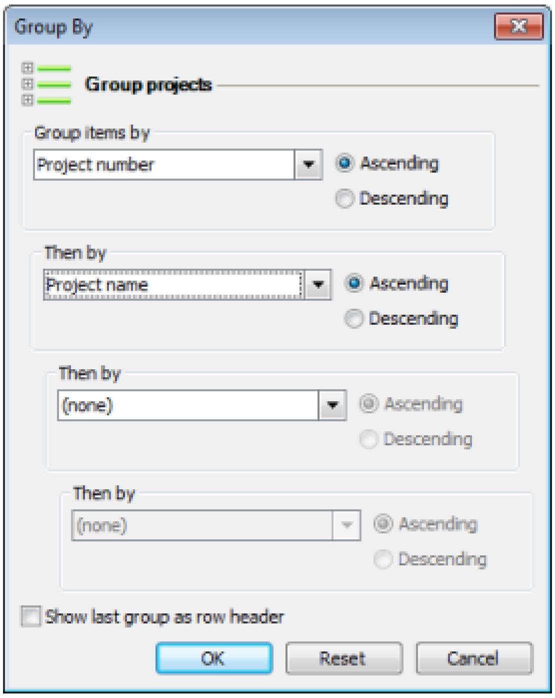
Group the projects with InLoox PM according to the different criteria. This feature makes easier the project management and allows project information to be found quickly.

Follow these steps below to group your projects:

1. Click the **InLoox PM** tab on the **Outlook Ribbon** and then **Timeline**.

   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Timeline** in the InLoox PM project list.

2. On the **InLoox PM Ribbon**, on the **Start** tab, in the **Timeline details** group, click **Group**.
3. In the **Group by** dialog box, perform one or more of the following actions:



   - **Group items by** Choose a group field from the following groups: **Start date**, **End date**, **Categories**, **Progress**, **Priority**, **Project number**, **Project name**, **Client** or **Fixed deadline**.
     Then, the projects will be grouped by the selected field.
   - **Ascending** / **descending** Choose if you want to group in ascending or descending order.
   - **Then by** You have the option to group by four fields.

- **Show last group as row header** This option creates a title column by the last group field.

4. Click **OK** or **Reset**, if you don't want to save the changes.

Search and find projects

You will find in the project list several options to find a project you are looking for. This chapter will introduce you to the **search function**, the use of **views** and **filters** when searching a project.

Article content

Search function

1. Click **Project list** on the **Outlook Ribbon** to switch to the InLoox PM project list.
   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.
2. Type into the field **Search projects** the project name or other information on the project you want to find.
3. Click .

   The projects, which include the entered text, are displayed.

   NOTE If the search is completed, you can clean up the search field by clicking **Close search** .

Use views

1. Click **Project list** on the **Outlook Ribbon** to switch to the InLoox PM project list.
   NOTE In Outlook 2003/2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.
2. Click the tab **InLoox PM** and then **More Views**, in the **Views** group.
   All saved views are displayed by default.
3. Choose one view from the list, e.g. **Projects: project manager view**. You will see an overview of all projects to which you are assigned as project manager.

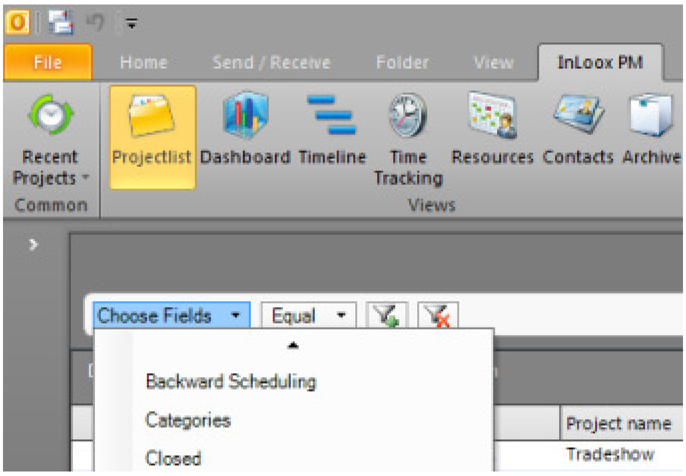
   TIP For more information on how to save a view, see Create a view.

Use filters

1. Click **Project list** on the **Outlook Ribbon** to switch to the InLoox PM project list.

   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. The **filter row** is available above the project list .



3. Once you have selected a field (e.g. Category or Closed) and a filter operator (e.g. Equal or Contains), you can enter a text in the field behind the filter operator, e.g. **marketing** and press **Enter**.
   InLoox PM filters the projects by the selected criteria, e.g. **category equal.**

   NOTE If you don't see the filter row then it was hidden. Right-click and choose in the context menu **Show filter** in order to display it.

Copy and delete projects

You can copy or delete the projects in the project list. The description below explains how to do it.

Article content

Copy a project

1. Click **Projects** in the **Outlook Ribbon** to switch to the InLoox PM project list.

2. Choose the project from the project list, that you want to copy.
3. Use one of the following actions to copy the project:
    - Copy with the keyboard shortcut **STRG+C.**
    - Copy with the **context menu** by right-clicking on the project. Choose **Copy** from the list.
    - Copy via the **Copy** button, in the group **Actions**, on the **Home** tab, in the **InLoox PM Ribbon**.
4. Paste the marked project by using one of the following actions:
    - Via the keyboard shortcut **STRG+V**, via the context menu or via the **Paste** button, in the group **Actions**, on the **Home** tab, in the **InLoox PM Ribbon**.

NOTE Please choose another project number for the copied project in order to edit it. See Set a project name and a number for more information.

Delete a project

1. Click **Project list** in the **InLoox PM Ribbon** to switch to the InLoox PM project list.
2. Choose the project from the project list, that you want to delete.
3. In the **InLoox Ribbon**, on the **Home** tab, in the **Delete** group, click **Delete** or right-click on the project and choose **Delete Project** from the context menu.

Copy and delete projects in Outlook 2003/2007

You can copy or delete selected projects in the project list. The description below explains how to do it.

Article content

Copy a project

1. Click **InLoox Folder** in the **InLoox Toolbar** to switch to the **InLoox project list**.
2. Choose the project from the project list, that you want to copy.
3. Use one of the following actions to :
    - Copy with the keyboard shortcut **STRG+C.**
    - Copy with the **context menu** by right-clicking on the project. Choose **Copy** from the list.
    - Copy via **Copy** button in the menu bar.
4. Paste the marked project by using one of the following actions:
    - Via the keyboard shortcut **STRG+V**, via the context menu or via the **Paste** button in the menu bar.

NOTE Please choose another project number for the copied project in order to edit it. See Set a project name and a number for more information.

Delete a project

1. Click **Inloox Folder** in the **InLoox Toolbar** to switch to the **InLoox project list**.
2. Choose the project from the project list, that you want to delete.
3. Click **Delete** in the menu bar or right-click on the project and choose **Delete Project** from the context menu.

View, restore, or delete projects in the recycle projects view

The recycle bin provides a safety net when deleting projects. When any of the projects from the project list are deleted, the projects remain in the recycle bin. Items in the recycle bin remain there until you decide to delete them permanently.

Article content

View projects in the recycle projects

1. On the InLoox PM Ribbon, on the **InLoox PM** tab, in the **Extras** group, click **Recycle Projects** to display the **Recycle Projects** dialog box.

   NOTE In Outlook 2003/2007, click **Extras** in the **InLoox PM Toolbar**, and choose **Recycle Projects** from the list.

2. For a better overview, you can group the projects. Do the following:
   - Group by one of the column headers by clicking and dropping it into the group field above the columns.

Restore or delete the projects in the recycle projects view

On the **InLoox PM Ribbon**, on the **InLoox PM** tab, in the **Extras** group, click **Recycle Projects** to display the **Recycle Projects** dialog box. Perform one of the following actions:
NOTE In Outlook 2003/2007 click **Extras** in the **InLoox PM Toolbar**, and choose **Recycle Projects** from the list.

- **Restore a project** Click the project you want to restore and then click **Restore**. This Project will be restored in the original location.
- **Delete a project** Click the project you want to delete and then click **Delete**.
  NOTE Only users with the administrative rights can delete projects permanently.

Management

Assign a project name and number

1. Create a new project.
   TIP For more information on how to create a project see Create a project.
2. In the **Project** area, in the **Name** field enter the name of your project. The project name is a freely definable description of the project.
   NOTE The project name can be used for more than one project.
3. In the **Name** field enter the number of your project to identify it in the InLoox PM system. This field is a mandatory field. You can customize the number in the InLoox PM options.
   TIP For more information see Change the number format.

Adjust the project number

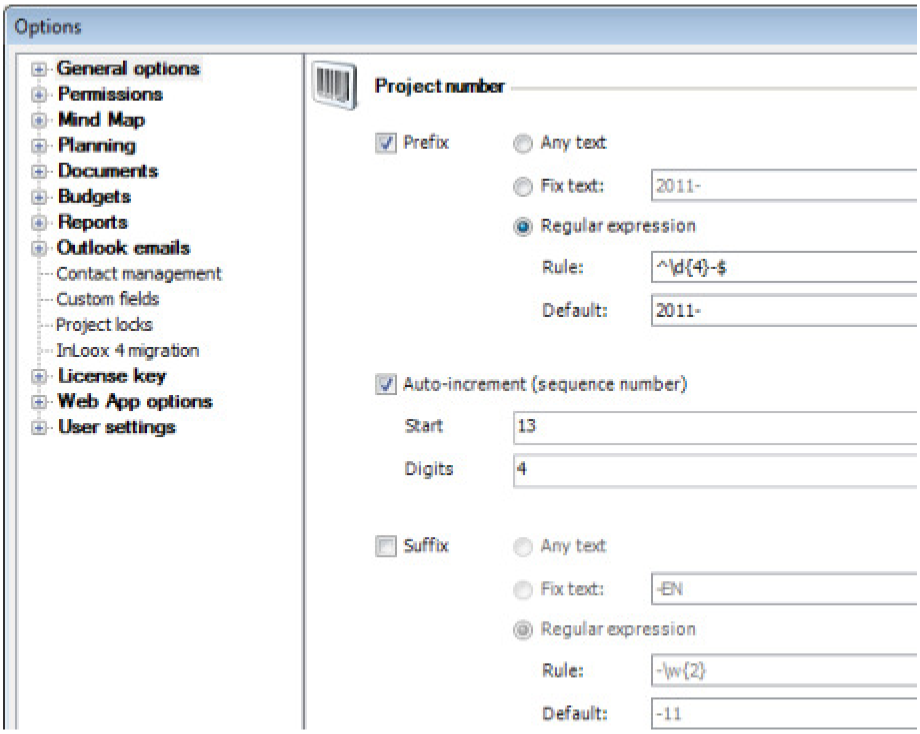
In the InLoox PM options, you can customize and configure the InLoox PM features, inter alia the project number.

TIP The options also define the project number format. For more information see Change the number format.

Article content

Setting a project number

1. Open the dialog box **InLoox PM Options**.
   TIP For more information on how to open the InLoox PM options, see Open the InLoox PM options.
2. Under **General options**, click **Project number**. On the right side you see the **Project number** area:



3. Choose the respective option by activating the related check box:
   - For the project number choose **Prefix** (leading character string), **Sequence number** or **Suffix** (trailing character string).
   - For the number setting, you need at least a **Prefix** or a **Sequence number**.
   - Combine a **Prefix** or **Suffix** with a **Sequence number**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

Mode description for prefix and suffix

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**. TIP Please note the format rules, for more information see Change the number format. InLoox PM verifies if the number of the created project has the right format. If the number doesn't correspond to the specified format, the user is asked to correct the project number.

Examples of common formats

Example	Configuration
Four-digit year combined with sequence number (e.g. "Project 2011-008")	**Prefix**: • Rule: **^Customer \d{4}-$**

components: • "Project 2011-" (fixed prefix with year). • "Sequence number" (maximum 3 digits with leading zeroes).	• Standard value: **Customer 2011-** or **Customer 2012-** **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

WARNING Effects of changing the number format:

Change the number format

In the InLoox PM options, in the area **Project number**, you can define the format rules for project numbers. Please note the possible effects when changing settings. For more information see Customize the project number.

Article content

Format rules

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 COUNT characters. COUNT stands for any positive integer, e.g. **5**.
\D{COUNT}	Any character string (A-Z, a-z, special characters, umlauts, spaces) with COUNT characters. Numerics are not allowed.
\W	Single special character. (A-Z, a-z) or numeric (0-9) are 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**

Assign a division, customer and category

On the site **Management**, in the area **Project** you can assign a **division**, **customer** and **category**. These entries help you to easily find, filter, sort and group the projects in the project list.

NOTES For more information on how to find or filter projects see Search and find projects. For information about how to sort and group projects, please see Create a view.

Article content

Add a division

Determine a customer

Choose a category

Add a division

1. Open an existing project or create a new one.
   TIP For more information on how to create a project see Create a project.
2. On the **Management** page, in the **Project** area, click **Division**.
3. In the **Division Structure** dialog box choose an internal or external division for the responsibility of the project.
   TIP For more information on how to create, edit or delete a division in InLoox PM see Adjust the division structure.
4. Click **OK**.

WARNING This feature is only available in InLoox Enterprise Edition.

NOTE If you have already saved new divisions in the InLoox PM options, you can see them in the quick selection of the **Division** command. Click the **Arrow** and choose a division from the drop-down list. Click **Delete selection**, if you want to clear the selection.

Determine a customer

1. Open an existing project or create a new one.
   TIP For more information on how to create a project see Create a new project.
2. On the **Management** page, in the **Project** area click **Customer**, to open the dialog box.
3. Do one of the following in the **Customer** dialog box:
   - Add one of the customers from the list that is already set.
   - Click **New** to add another customer. In the **New Customer** dialog box type a new name in the **Name** box and click **OK**.

   TIP For more information on how to create, edit or delete a customer in InLoox PM see Create or manage a customer.

4. Click **OK**.

NOTE If you have already saved new customers in the InLoox PM options, you can see them in the quick selection of the **Customer** command. Click the **Arrow** and choose a customer from the drop-down list. Click **Delete selection**, if you want to clear the selection.

Choose a category

1. Open an existing project or create a new one.
   TIP For more information on how to create a project see Create a project.
2. On the **Management** page, in the **Project** area click **Category**. The **Category** dialog box will be displayed.
3. Choose one or more categories from the list in this dialog box.
   The categories are free-definable classification criterion for the projects.
   TIP For more information on how to create, edit or delete a category in the InLoox PM system see Manage categories.
4. Click **OK**.

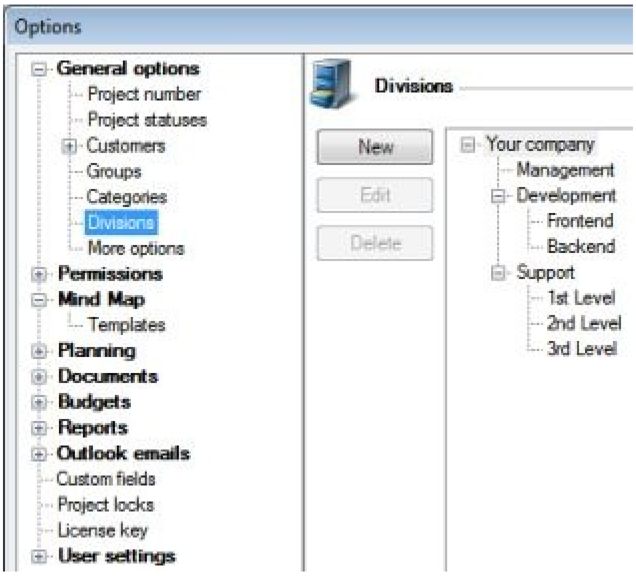
NOTE Use the quick selection by clicking **Arrow** . In the drop-down list choose a category you want to add. Click **Delete all categories** to clear the selection.

Adjust the division structure

InLoox PM uses its own division structure which is independent of the Outlook one. This structure is available only in the **InLoox PM Enterprise Edition** and is selectable in the projects.

The divisions can be structured to any level and can be assigned to a specific project.

1. Open the dialog box **InLoox PM Options**.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Under **General options** click **Divisions**. On the right side you see the **Division** area:



3. Do one of the following:
   - Insert a new division to change the division structure. Click **New** and enter a name in the **Name** box and notes in the **Description** box (if necessary) in the dialog box **New Division**.
   - Edit the existing division structure. Choose one entry from the division list and click **Edit** in order to change it.
   - Remove a selected division from the list by clicking **Delete**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

WARNING Effects of editing or deleting a division:

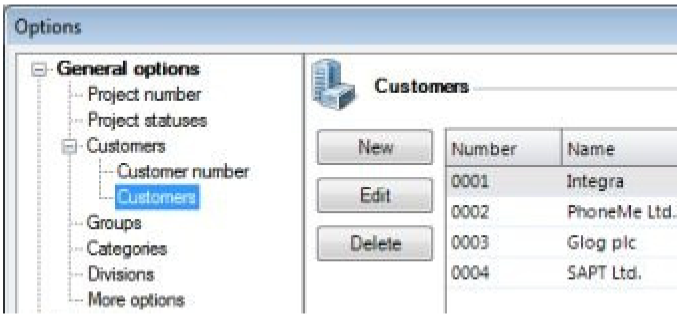
- The renaming of a division takes immediate effect in all relevant projects.
- The deletion of a division takes immediate effect in all relevant projects.

Create and manage a customer

The InLoox PM options support you with a central customer management. Create a new customer system-wide in the InLoox PM options as well as in the project directly.

To manage customers, do the following:

1. Open the dialog box **InLoox PM Options**.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Under **General options** click **Customer** and then **Customers**. On the right side you see the **Customers** area:



3. Do one of the following:
   - Insert a new customer in InLoox PM by clicking **New**. In the **New customer** dialog box enter a name in the **Name** field. InLoox PM automatically assigns a number to the new customer.

     TIP For more information on how to change a customer number format, see Adjust the customer number.
   - Change the name of an existing customer. Choose the respective customer from the list and click **Edit**.
   - Remove a customer from InLoox PM by clicking **Delete**.
4. Click **OK** or **Apply** to save the changes in IInLoox PM.

WARNING Effects of editing or deleting a customer:

- The renaming of a customer takes immediate effect in all relevant projects.
- The deletion of a customer takes immediate effect in all relevant projects.

Adjust the customer number

In the InLoox PM options, you can customize and configure the InLoox PM features, inter alia the customer number. In the InLoox PM Options, in the Customer number area, you can define the number format rules.

Article content

Adjust a customer number

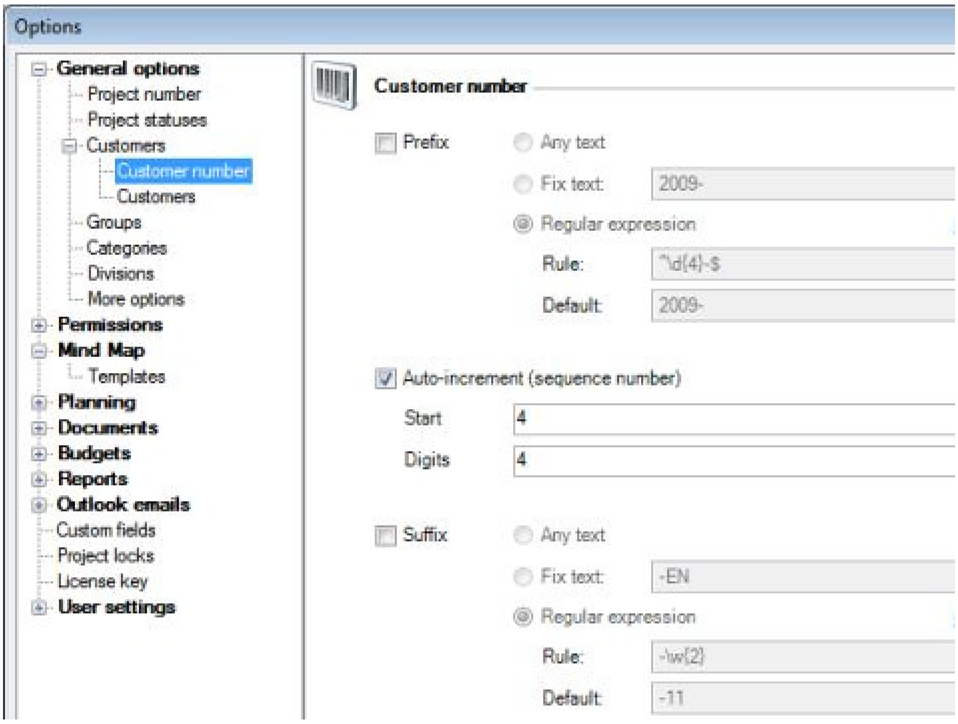
Mode description for prefix and suffix

Examples of common formats

Adjust a customer number

1. Open the dialog box **InLoox PM options**.

   TIP For more information on how to open InLoox PM options, please see Open the InLoox PM options.
2. Under **General options** click **Customer number**. On the right side you see the **Customer number** area:



3. Choose the required options by activating the related check boxes:
   - For the project number, choose **Prefix** (leading character string), **Sequence number** or **Suffix** (trailing character string).
   - For the number setting you need at least a **Prefix** or **Sequence number**.
   - Combine a **Prefix** or a **Suffix** with a **Sequence number**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

Mode description for prefix and suffix

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. TIP For more information see Change the number format. InLoox PM verifies if the number of the created project has the right format. If the number doesn't correspond to the specified format, the user is asked to correct the project number.

Examples of common formats

Example	Configuration
Four-digit year combined with sequence number (e.g. "Project 2011-008")	**Prefix**: • Rule: **^Customer \d{4}-$**

components: • "Project 2011-" (fixed prefix with year). • "Sequence number" (maximum 3 digits with leading zeroes).	• Standard value: **Customer 2011-** or **Customer 2012-** **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

WARNING Effects of changing the number format:

- New projects are created automatically with numbers in the new format.
- Existing projects retain their old numbers.
- A once assigned sequence number cannot be used again.

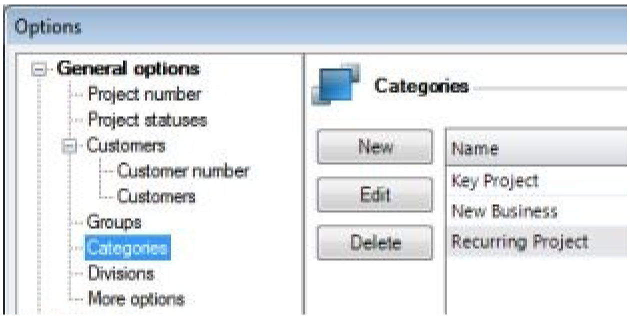
Manage categories

InLoox PM uses its own category list for the projects, which is independent from the Outlook one. The list has key advantages in the multiuser versions **InLoox PM Workgroup** or **Enterprise Server** in comparison to the standard Outlook category list:

- The category list is consistent across all workstations. This saves manual reconciliation effort between the individual workstations.
- The list can only be maintained by the InLoox PM administrator, which ensures that only standard categories are available.

To manage a category, do the following:

1. Open the **InLoox PM options**.
   TIP For more information on how to open the InLoox PM options, see Open the InLoox PM options.
2. Under **General options** click **Categories** . On the right side, you see the **Categories** area:



3. Do one of the following:
   - Insert a new category in InLoox PM by clicking **New**. In the **New Category** dialog box, in the **Name** field enter a new name.
   - Change the name of an existing category. Choose one category from the list and click **Edit**.
   - Remove a category from InLoox PM by clicking **Delete**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

WARNING Effects of editing or deleting a category:

- The renaming of a category takes immediate effect in all related projects.
- The deletion of a category takes immediate effect in all related projects.

Add project team members

By assigning project team members such as members of the project team, project partners, customers etc., you are able to distribute the workload of the project to the co-workers and to inform project members which projects they are assigned to or following up its process. Your employees will know for which parts of the business they are responsible.

By setting up a project team, you define access permissions to the project.

1. Open an existing project or create a new one.
   TIP For more information on how to create a project see Create a project.
2. On the **Management** page, in the **Staff** area do the following:

- **Assign a project manager** Click **Manager** and then in the **Choose Resource** dialog box choose an address book from the **Address Book** drop-down list. Select from the list one or more names for the project.
- **Assign a team** Click **Team** and select from the list one or more internal co-workers.
- **Assign a customer** Click **Customer** and select from the list one or more customer contacts for the project.
- **Assign a partner** Click **Partner** and select from the list one or more persons, whom you want to add to the project as project partners.
- **Assign more team members** Click **More** and specify any other contacts, e.g. quality control staff, heads of department or other stakeholders.

TIPS

- It is possible that you set permissions (read/write and delete) by assigning persons to the project in **InLoox PM Workgroup** or **Enterprise Server**, if InLoox PM is accordingly configured. For more information see the category Security and Data Protection.
- InLoox PM provides you with different address books such as the InLoox PM address book, Microsoft Outlook and Exchange Server address books.
- Use the **Skills** feature on the **Choose Resource** dialog box to assign resources according to their skills. Click the **Search by Skills** drop-down list and activate the check boxes of the required skills. Then click **OK**. A list of employees with the respective skills is displayed. Select a resource from the list and click **OK**. For more information see Assign skills to resources.

NOTES In the **Staff** area, the following possibilities are available:

- Double-click the name of the staff member to open the assigned contact.
- Select a mailing list containing for example all members of the customer's **project team**. Mailing lists are **automatically resolved** by InLoox PM.
- Right click on one of the resources to open the context menu and choose **Delete** or **Delete all items** to remove the name or names. Use **Up** and **Down** to change the order of the names. Click **Details** to open the contact information.
- Use the **quick selection** to add a new resource. Click the **Arrow** in the button to see the drop-down list of all resources that have been added to the project. In the new project, you will see the resources that are involved in the other InLoox PM projects. Click **Delete all contacts** to clear the selection.
- Use **Drag&Drop** to shift a resource to another box, e.g. from the **Partner** box to the **Customer(s)** box by clicking the respective name and dragging it with the mouse to the field.
- Pull out a resource out of the box in order to remove it.
- Press CTRL and drag a resource to another box to copy it.

Add a status and date

Add the following project data in the **Schedule** area to organize your project list more easily:

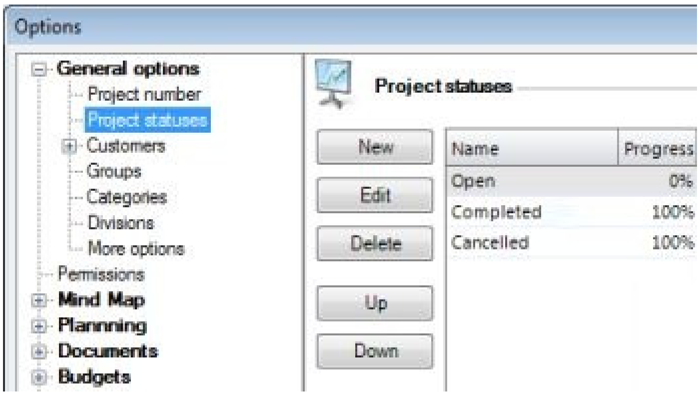
- **Status** Specify the state of the project development. Choose between **In progress**, **Completed** or **Discontinued**.
  TIPS
  - The display in the project list depends on the status controlls the display of the project list. For more information see Generate personalized views.
  - You can customize a status. For more information see Change the project status.
- **Start and End** Select from the calendar a date for the project start or its end. The current date is preselected when creating a new project. The end date must not be earlier than the start date.
  NOTE The display of the project depends on the project start and end.

Change the project status

The status defines different project states and degrees of completion. You can find the project status in the project, on the **Management** page, in the **Schedule** area.

You can define as many project statuses as you want in the InLoox PM options and connect them to the project progress expressed as a percentage. This is how you do it:

1. Open the dialog box **InLoox PM Options**.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Under **General options** click **Project statuses**. On the right side, you will the **Project statuses** area:



3. Do one of the following:
   - Create a new project status by clicking **New**. In the **New Project Status** dialog box, enter a name and a progress (in %). The progress is a percentage figure, i.e. an integer between **0** and **100**.
   - Edit the existing project status. Choose one status from the list and click **Edit**.
   - Remove the selected project status from InLoox PM by clicking **Delete**.
   - You can change the status position in the list. Click **Up** to move it upwards or **Down** to move it downwards in the list.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

NOTE The project statuses list contains the name and progress of each state. The sequence of this list corresponds to the sequence displayed in the projects, on the Management page.

WARNING Effects of editing or deleting a status:

- Adding a new status 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.

Create and change comments

Use comments to leave any additional information on the project. Comments contain text-based information and the creator's name, time and date of the entry as well as hyperlinks, symbols or images. InLoox PM allows any number of comments from different persons.

Article content

Create a comment

Create a comment in any project:

1. Open an existing project or create a new one.
   TIP For more information on how to create a project, please see Create a project.
2. On the **Management** page, in the **Comment** box, type the comment you want to leave. Enter here for example the project objective, the order type or internal remarks.You can format your text comment and add hyperlinks, symbols and images. Please find the complete instruction in the **Customize a comment** area below.
3. Click **Post Comment**.

   IMPORTANT As soon as you save your comment with this command, you cannot edit it again.
   Now, you see the saved comment in the list below.

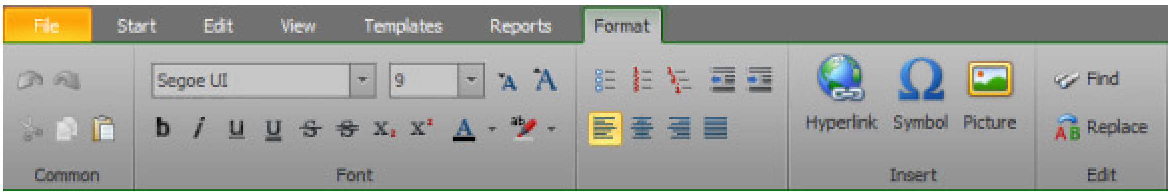
TIPPS

- Click the arrow on the right to open it.
- On the **View** tab, in the **Common** group, click **Expand or Collapse** in order to open or close the comments in the comment preview. Click **Expand all** above the comment list as alternative.
- You have, however, the possibility to delete it. Click **Delete** ✕ in the comment preview to remove the comment. You need the corresponding permission to do this. For more information about assigning permissions, see Set up permissions.

InLoox PM always saves the name of the person, who made the changes. InLoox PM displays the Outlook, Windows or InLoox PM account name.

Customize a comment

You can change the appearance of your comments with InLoox PM features. Compose and customize your comment with different fonts, colors, sizes, etc., to arrange the comment information clearly and manage it more easily. All comands for formatting are on the **Format** tab.



Change the font

- On the **Format** tab, in the **Font** group, you can select the font, font size, font style (bold, italic, strikethrough, double strikethrough, subscript, superscript, underline and double underline), font color, and text highlighting.
- You can also increase or decrease the size by one increment, and change the case.

Add a numbered or bulleted list

1. On the **Format** tab, in the **Font** group, click the Bullets or Numbering command.
   Press ENTER to add the next list item.
2. InLoox PM inserts automatically the next bullet or number.
3. To finish the list, press ENTER twice or press BACKSPACE to delete the last bullet or number in the list.

Add further elements

Add hyperlinks, symbols or images to your comments to make your information more visual and to provide information more easily.

1. On the **Format** tab, in the **Insert** group, click one of the following:
   - **Hyperlink** If you want to link a file, a website or a picture, click **Hyperlink**. In the **Text to display** field enter the text that will be displayed in your comment. In the **Address** field select a file path or enter the URL of a web site.
   - **Symbol** Using this command, you can enter the following:
     - Symbols that are not on the keyboard, such as ¼ and ©.
     - Special characters that are not on the keyboard, such as an arrow (→) or a dash (—).
     - Unicode characters.

If you are using an expanded font, such as Arial or Times New Roman, the symbols in the list are displayed then in the selected font. In the list you can also select the language characters, such as Arabic or Russian (Cyrillic) letters, if available.

- **Picture** Browse to the folder where the picture that you want to add is saved, select the picture, and then click **Insert**. You can resize the picture directly in the comment.

Find text

You can quickly search for every occurrence of a specific word or phrase.

1. On the **Format** tab, in the **Editing** group, click **Find**.
2. In the **Find** box, enter the text you want to search for.
3. Do one of the following:
    - Click **Find next** to search for every occurrence of a word or phrase.
    - If you want to search simultaneously for all occurrences of a word or phrase, click **Search: All** and choose between **Match case**, **Find whole words only**, **Regular expression**.

NOTE To cancel a search progress, press ESC.

Replace text

You can automatically replace a specific word or phrase.

NOTE If you replace the word or phrase by another one, the new word or phrase overtakes the formatting of the old one.

1. On the **Format** tab, in the **Editing** group, click **Replace**.
2. In the **Find** box, enter the text you want to search for.
3. In the **Replace with** box, enter a new text.
4. Select **Other options** to do one of the following:
    - Click **Find next** to search for another occurrence of the word or phrase.
    - Click **Replace** to replace the occurrence of a word or phrase by another one.
    - Click **Replace All** to change all occurrences.

NOTE To cancel a replace progress, press ESC.

Add other project information

On the **Edit** tab, in the **Status** group, you can add the following elements to a project:

- **Priority** You can set the level of importance of a project. On the **Edit** tab, in the **Status** group, choose whether the project has **high**, **low** or **normal** priority. Setting the level of importance also enables you to sort the projects in the project list by importance.

- **Fixed deadline** With this command, you can define whether the completion date of the project can be seen in the planning or not. Typical examples of fixed deadline projects are trade fairs or Christmas card mailings.

  TIP The project end is marked in red in the planning. For more information, see Work with the Gantt chart, in the Information rules in the project list section.

- **Archived** With this command, you can archive the project. The archived project will be saved in the project archive.

  TIP For more information, see the category Project archive.

- **Lock project** This command protects your project from being changed by other users. Only authorized users can change this mode.

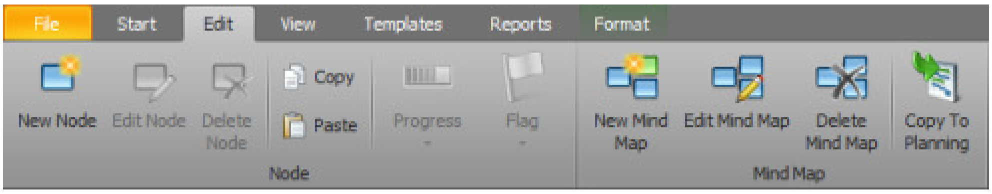
  TIP For more information, please see Set up permissions.

Mind maps

Work with the mind map

Click **Mind Maps** 

to open the **Mind Map** page. On this page you will find the following features:



- **Add new node** On the **Edit** tab in the **Node** group click **New Node**. You can name it directly in the mind map view or by right-clicking the mouse an choosing **Edit** in the context menu.

  TIP For more information see Create a node.

- **Edit a node** On the **Edit** tab in the **Node** group click **Edit Node** to add further information to the selected node.
- **Remove a node** On the **Edit** tab in the **Node** group click **Delete Node** to remove the selected node from the mind map.
- **Copy and paste** Create quickly child nodes with the help of **Copy** and **Paste** in the **Node** group on the **Edit** tab.
- **Set a progress to the node** On the **Edit** tab in the **Node** group click **Progress** and choose the percentage figure from the drop-down list.

- **Mark the node** On the **Edit** tab in the **Node** group click **Flag** and select a color from the drop-down list.
- **Create a new mind map** On the **Edit** tab in the **Mind Map** group click **New Mind Map**.

TIP For more information see Create a new mind map.

- **Edit a mind map** On the **Edit** tab in the **Mind Map** group click **Edit Mind Map** to add further information.
- **Remove a mind map** On the **Edit** tab in the **Mind Map** group click **Delete Mind Map** to remove the selected mind map.
- **Copy mind map to planning** On the **Edit** tab in the **Mind Map** group click **Copy To Planning** to transfer all nodes and the structure to the planning.

TIP For more information see Copy a mind map to planning.

- **Print a mind map view** On the **View** tab in the **Common** group, click **Print** to start the quick print feature of the mind map view.

TIP For more information about printing, see General features and print of the project list, in the **Print in the project list** area.

- **Expand or reduce the mind map view** Change the view with the help of **Expand All** or **Collapse All** in the **Common** group on the **View** tab to make clear the mind map view.
- **Restore the mind map view** On the **View** tab in the **View** group click **1:1** to set back the original zoom level.
- **Enlarge or reduce the mind map view** On the **View** tab in the **View** group click **Zoom In** or **Zoom Out** to change the zoom level of the view.
- **Show resources** On the **View** tab in the **Resources** group click **Resources** to check the resource utilization.

TIP For more information see Open and manage resources.

- **Load the existing data of one mind map** On the **Templates** tab in the **Templates** group click **Load Template** and choose the needed format from the drop-down list.
  You can also load a template from the gallery view in the **InLoox PM Templates** group.

TIP For more information see Load a mind map template.

- **Save an existing mind map as a template** On the **Templates** tab in the **Action** group click **Save Template** to save a mind map, in order to insert it as a picture or in other format to PowerPoint, Word or in the other project.

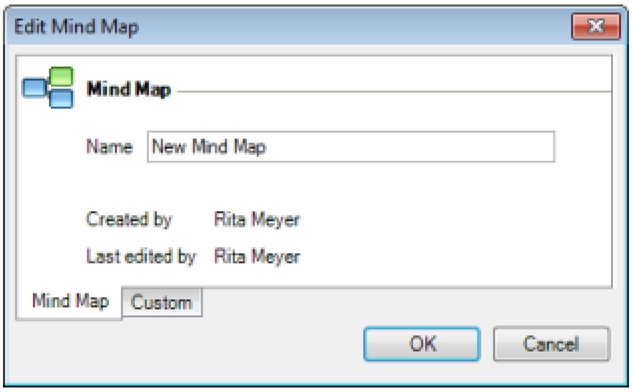
TIP For more information see Save a mind map template.

- **Send mind map vie email** On the **Templates** tab in the **Action** group click **Send Template by Email**, to send a mind map e.g. to your colleagues.
- **Format the mind map** On the **Format** tab in the **Format** group you can customize **font**, **background** and **frame color** of the selected node.
- **Format the child node** On the **Format** tab in the **Format** group click **Format Child Elements** to apply the selected format of the mind map to the child nodes.
- **Add a symbol to the node** Select one node from the mind map and choose symbole from the **Symbols** gallery view on the **Format** tab.

Create a mind map

On the mind map page of the project, you can collect and organize ideas and information visually. In a mind map, you always have all ideas, concepts and drafts at a glance.

1. Open an existing project or create a new one.
   TIP For more information on how to create a project, please see Create a project.
2. In the project, on the **Mind Maps** page you find a new mind map.
   In the **Edit** tab, in the **Mind Map** group, click **Edit Mind Map** to assign a name. You can also add a new name by right-clicking the mouse, and then clicking **Edit Mind Map** in the context menu.
3. In the **Edit Mind Map** dialog box, in the **Name** field, type a name for your mind map.



4. In this dialog box, click **Custom** to edit custom fields, which have been already saved in InLoox PM.
   NOTE For more information on how to add a new custom field in InLoox PM, see Create a custom fields.

Create another mind map

1. To create another mind map in your project you can use the following possibilities:
   - In the **Mind Map** group click **New Mind Map** .
   - Right-click the mouse and choose **New Mind Map** from the context menu.
   - Click  in the lower menu bar.
   - Keyboard shortcut Press STRG+M to create a new mind map.
2. For further information on how to enter data in the opened **New Mind Map** dialog box, please see the upper part of the article.

Create and edit a node

A mind map consists of different nodes, which are connected to the parent nodes. A name of a new mind map is automatically set as the name of the central node.

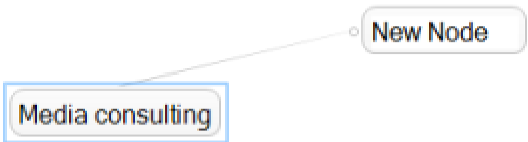
TIP For more information on how to create a new mind map, please see Create a mind map.

Structure your mind map by adding new nodes or editing the existing ones.

Article content

Add a node

1. Choose one of the following options to create a new node:
    - On the **Edit** tab, in the **Node** group, click **New Node**.
    - Right click on the **Mind Maps** area and click **New Node** in the context menu.
    - Use the keyboard shortcut STRG+N.
2. In the **Mind Maps** area, the new node will be displayed, which is connected with the node that is currently selected.

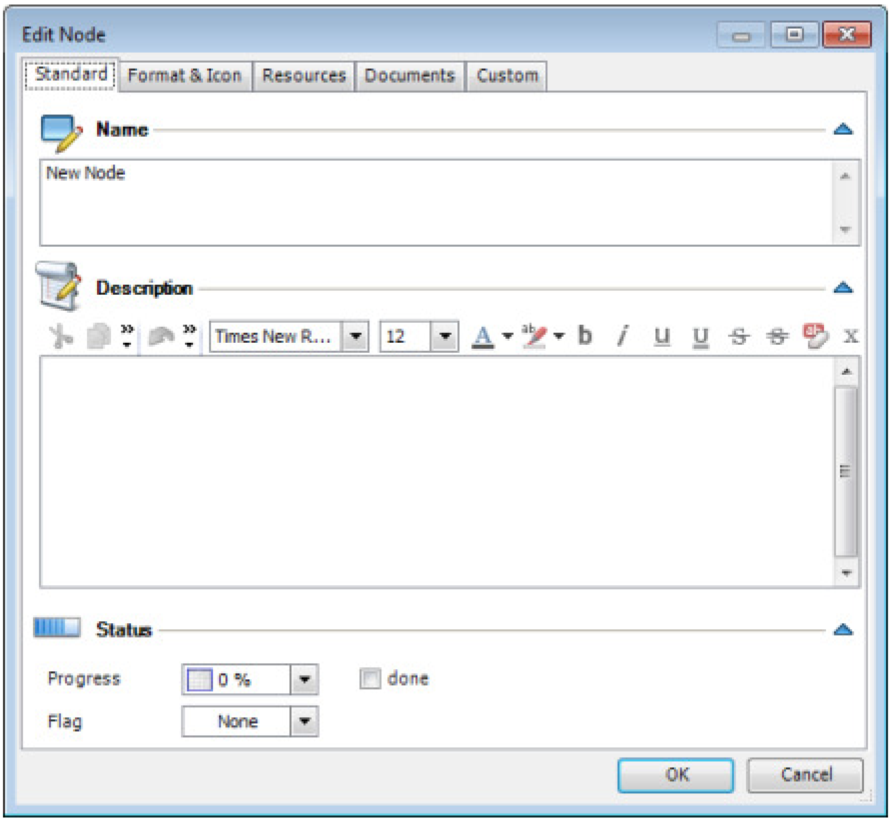


3. You can label the new node.

NOTE Create your mind map faster by adding new nodes by using **Copy** and **Paste** in the **Node** group.

Edit a node

1. Choose one of the following options to edit a node:
    - In the **Node** group, click **Edit Node**.
    - Right-click the mouse in the **Mind Maps** area and click **Edit Node** in the context menu.



2. In the **Edit Node** dialog box, on the Standard tab, do the following:
   - Rename the node by typing a new node name in the **Name** field.
   - Enter additional information on the node in the **Description** field. You can format the text as you want.

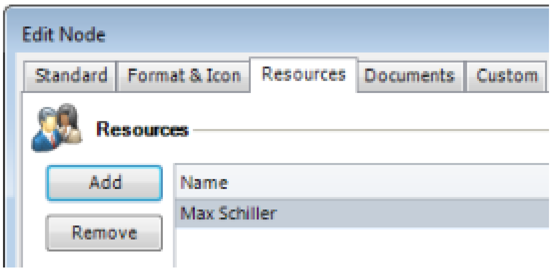
     TIP InLoox PM provides you with the range of the formatting features. For more information about these features, see Create and change comments, in the Customize a comment section.

   - In the **Status** area you can do the following changes:
     - Click **Progress** to display a list of different degrees of completion and choose the suitable degree. You can also activate the **done** check box to display the processing status of the node.
     - Choose from the **Flag** list a color to mark the node in the mind map.
3. Click the **Format & Icon** tab to format the node and do the following:
   - In the **Format** area, you can define the **font**, **font size**, **color** and the **color of the node** or **the color of the frame**.
   - In the Icon list, choose different pre-defined icons such as **basics**, **business** or **miscellaneous**. This icon will be displayed in the node.
4. Click the **Custom** tab to add additional information:
   - Click the previously created custom field, e.g. **work location**, and enter a new value for it.
     TIP For more information on how to add a new custom field in InLoox PM see Create a custom field.

Add resources to the node

You can assign resources to the nodes of your mind map to draft some initial thoughts about the assignment of activities.

1. Open the **Edit Node** dialog box to add a new resource. Choose one of the following options to open this dialog box:
    - In the **Node** group**,** click **Edit Node**.
    - Right click on the **Mind Maps** area and click **Edit** in the context menu.



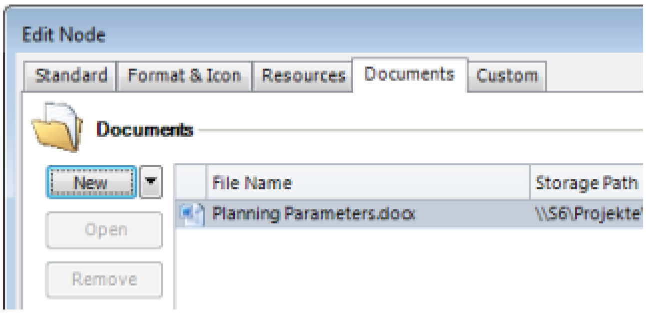
2. Click the **Resource** tab .
3. Do one of the following:
    - **Add a new resource**:
        1. Click **Add**.
        2. In the **New Resource** dialog box, in the **Browse for resource** field, click .
           NOTE Use the **quick selection** to add a new resource by clicking the **Arrow** . You can see in the drop-down list all resources which have already been added to the project.
        3. In the **Select contact** dialog box, choose one name from the list.
           InLoox PM provides you with the InLoox PM address book as well as with the contacts from Microsoft Outlook and Exchange Server.
           TIP Use the **Skills** feature to select resources according to their skills. Click **Search by Skills** and activate the check box of the skill(s) you are looking for. Click **OK**. A list of all resources that have the respective skill is displayed. Then select a resource from the list and click **OK**. For more information see Assign skills to resources.
        4. Click **OK**.
           In the **Name** list, the new name will be displayed.
    - **Remove a resource**:
        1. Choose the name of the resource you want to remove from the **Name** list.
        2. Click **Delete.**

Add documents to the node

You can add related documents to the nodes of your mind map. So, authorized users have direct access to the relevant documents.

IMPORTANT The document is only linked to the mind map but is not copied into the project.

1. Open the **Edit Node** dialog box to add a document. Choose one of the following options to open this dialog box:
    - In the group **Node** click **Edit Node**.
    - Right click on the **Mind Maps** area and click **Edit** in the context menu.



2. Click the **Documents** tab.
3. Do one of the following:
   - **Add a new document**:
     1. Click **Add**.
     2. Fill out the **New Document** dialog box with the required information.

        TIP For more information on how to add a document via the **New Document** dialog box, see Create and edit a document.
     3. Click **OK**.

        The added document is displayed in the node with a clip. Click this symbol to open the document. This document is also saved on the **Documents** page.
   - **Add a previously saved document from the Document page**:
     1. Click the **Arrow** next to the **Add** button.
     2. In the drop-down list, select **Link**.
     3. On the **Select Entry** dialog box, choose a document and click **OK**.
   - **Open a document**:
     1. In the **Documents** area, choose one document from the list.
     2. Click **Open**.
   - **Remove a document**:
     1. Choose the document from the list in the **Documents** area that you want to remove.
     2. Click **Delete**.

TIP You can link files with the InLoox PM project plan on your local computer or on a server. If you are a team member, specify the server path for the link to which all project team members have access.

For more information on how to add and edit the documents, see the category Documents.

Import a mind map template

Mind map templates accelerate the creation of mind maps. Templates contain predefined nodes and resource data.

TIP For more information on how to create a mind map template, see Save a mind map template.

Load the already available data to a new mind map.

1. Open an existing project or create a new one.

   TIP For more information on how to create a project, see Create a project.

2. In the project, on the **Start** tab, in the **Section** group, click **Mind Maps**.

3. On the **Mind Map** page, on the **Templates** tab, in the **Action** group, click **Import Template**.
4. In the drop-down list choose one of the following formats:
   - **MS Project File**
   - **MS Project Exchange File**
   - **XML File**
   - **InLoox PM Mind Map File**

   These formats allow you to load the template from your local data.

5. You can also select the saved templates in the **InLoox PM Templates** group in the gallery view.
   TIP For more information on how to save a template, see Save a mind map template.

Save a mind map template

You can save a mind map as a template in order to re-use it for other projects.

Save the selected mind map as follows:

1. Open an existing project or create a new one.

   TIP For more information on how to create a project, please see Create a new project.

2. In the project, in the **Start** tab, in the **Section** group click **Mind Maps**.
3. On the **Mind Maps** page, in the **Edit** tab, in the **Action** group, click **Save Template**.
4. In the drop-down list you can choose between the following formats:
   - **InLoox PM**
   - **Picture**
   - **Other Format**, e.g. **Extensible Markup** (XML).
5. By choosing the **InLoox PM** format, the **Save Template** dialog box will be displayed.

6. In the **Enter the name of the template** field, type a name.
7. Click **OK**.
   The saved template is displayed on the **Mind Maps** page, on the **Template** tab, in the **InLoox PM Template** group, in the gallery view.

   TIP For more information on how to change a template, see Manage mind map templates.

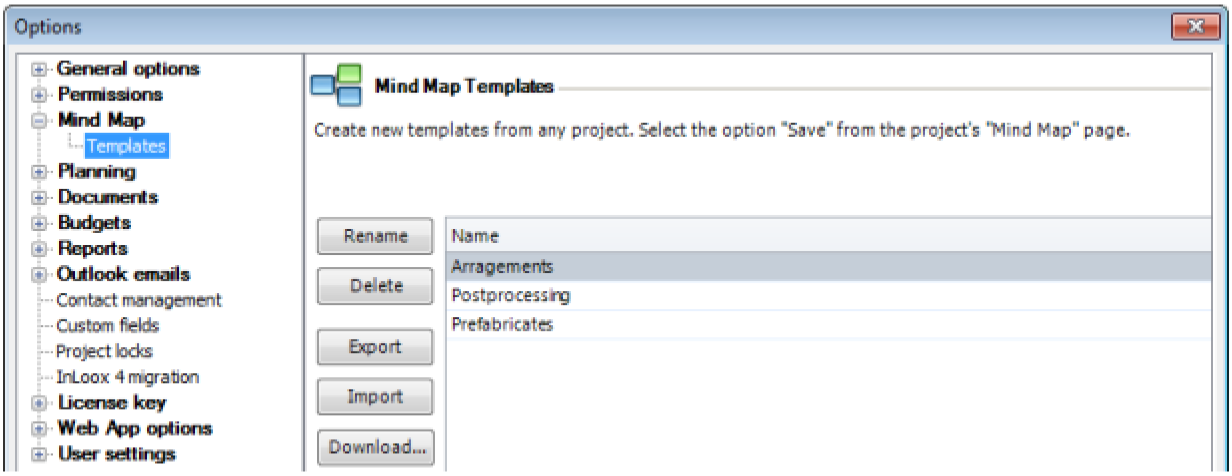
Manage mind map templates

In the InLoox PM options, you can edit mind map templates that are created in the projects.

TIP For more information on how to create a mind map template, see Save a mind map template.

IMPORTANT To manage the mind map templates, you need InLoox PM administrator permissions.

1. Open the dialog box **InLoox PM Options**.
   TIP For more information, where you can find the InLoox PM options, please see Open the InLoox PM options.
2. Under **Mind Map** click **Templates**. On the right side you see the **Mind Map Templates** area.



3. Perform one of the following actions:
   - Change the name of the saved template. Choose one template from the list and click **Rename**. In the **Rename Mind Map Template** dialog box, in the **New Name** field, type a new name for this template and click **OK**.
   - Remove a template permanently from InLoox PM. Choose one template from the list and click **Delete**.
   - Save a template in your local data, e.g. to send it to other users. Click **Export** and choose a local storage location on the **Save Mind Map Template** dialog box to save the template. Click **Open**.
   - Load a template from your local data. Click **Import** and choose a template in the **Load Mind Map Template** dialog box, then click **Open**.
   - Click **Download** to download the mind map templates from the InLoox website.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

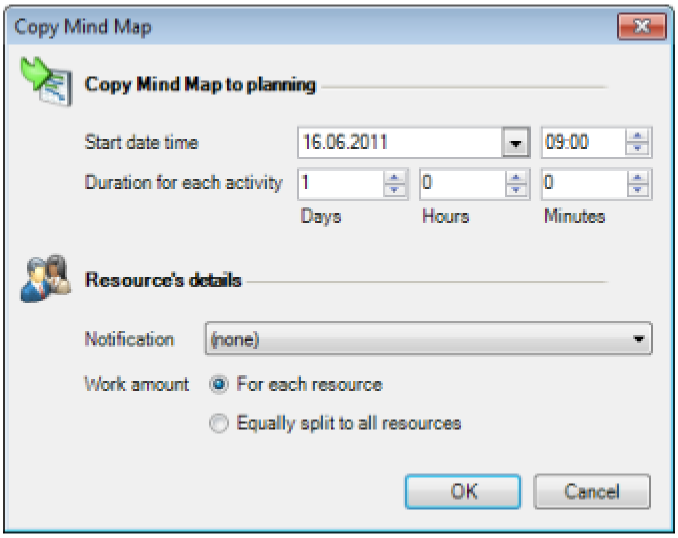
Copy a mind map to the planning

The mind map data can be copied to the planning. Each node will be an activity in the planning.

TIP For more information on how to create a mind map, see Create a mind map.

1. On the page **Mind Maps**, in the **Edit** tab, in the **Mind Map** group, click **Copy To Planning**.

2. In the **Copy Mind Map** dialog box, in the **Copy Mind Map to planning** area, do one of the following:



   - Define the start date time for the project planning.
   - Define the duration for each activity.
3. In the **Copy Mind Map** dialog box, in the **Resource's details** area, perform one of the following actions:

   TIP This area is displayed, when you have assigned resources to the mind map. For more information on how to assign the work packages, see Add resources to the node.
   - Choose one of the notification types in the **Notification** drop-down list.

     TIP For more information about the different notification types, see Add resources.

   - Define the work amount for the resources. The workload can be allocated as follows:

     - Workload is **applied for each resources** All resources will have a capacity utilization of **100 percent**.
     - Workload is **equally split to all resources** The total workload will be distributed equally to each resource.
4. Click **OK**.

Planning

Work with the planning

InLoox PM facilitates to edit your project planning in a time-saving way. Find out more about the features on the InLoox PM Ribbon that allow you to create and edit the planning.

Article content

Edit planning elements via the InLoox PM Ribbon

In the project, on the **Start** tab, click **Planning**  to open the **Planning** page. On this page you will find the following features:

- **Create and edit an activity** To create a new activity, click on the **Edit** tab in the **Edit** group **New activity**. To edit an already existed activity, select an activity from the planning list. On the **Edit** tab, in the **Edit** group click **Edit**.

  TIP For more information on how to create an activity, see Create and edit an activity.

- **Create and edit a milestone** To create a new milestone click **New Milestone** on the **Edit** tab, in the **Edit** group. To edit an already existed one, select a milestone from the planning list and click **Edit** in the **Edit** group.

  TIPS

  - For more information on how to create a milestone, see Create and edit a milestone.
  - Use the multiselection for simultaneous editing of the planning elements. Click the first planning lement you want to edit and hold the Ctrl key on the keyboard while clicking on all the planning elements you want to edit. Then click **Edit** on the **Edit** tab, in the **Edit** group.
- **Remove a planning element** Select the planning element from the planning list you want to remove. On the **Edit** tab, in the **Edit** group, click **Delete**.
- **Undo, redo or repeat an action**
  - You can undo an action, e.g. if you have accidently deleted one planning element. On the **Edit** tab, in the **Edit** group, click **Undo**.
  - You can repeat the last action. On the **Edit** tab, in the **Edit** group, click **Redo**.
- **Create your planning faster** Use the **Copy** and **Paste** commands from the **Edit** group on the **Edit** tab to copy already existing planning elements and insert them into a new planning. You can edit the newly created elements as you want.
- **Mark planning elements as done** Select an activity or milestone from the planning list, which is finished, and click **Done** in the **Highlight** group on the **Edit** tab to mark the planning element as done.
- **Highlight a planning element in the planning list** Select one planning element from the planning list and click **Flag** in the **Highlight** group on the **Edit** tab. Choose one color from the drop-down list.
  Now you can see the selected flag in the planning list next to the element.
  NOTE Unlike in previous versions, the selected flag color does not have an impact on the color of the element in the Gantt chart in InLoox PM 7.

- **Highlight a planning element in the Gantt chart** Select one planning element from the planning list and click **Color** in the **Highlight** group on the **Edit** tab. Click the color circle to select a user-defined color from the color spectrum. Click the arrow to see a compact pre-selection of standard colors. The planning element will be displayed in the Gantt chart in the selected color.
- **Synchronize work package with Outlook elements** Select one element from the planning list and click **Synchronize with** in the **Action** group on the **Edit** tab. Select either **Outlook Task** or **Outlook Calendar** from the drop-down list.

  TIP For more information, see Quick access panels for tasks and calendar, in the InLoox PM elements in the Outlook task list / the Outlook calendar section.
- **Assign a work package** Select a planning element from the planning list and click **Add Workpackage** in the **Action** group, on the **Edit** tab. In the **New Work Package** dialog box, fill in the needed information:
  - Select the resource that you want to assign the work package to.
  - TIP For more information on how to do this, see Add resources.
  - Additionally, you can select the **This task is already completed** check box to mark the work package as done.
- **Remove the defined constraints of planning elements** Select from the planning list an element with time constraints and click **Remove Constraint** in the **Action** group, on the **Edit** tab.

  TIP For more information about constraints, see Create dependencies between planning elements.
- **Remove the dependency between planning elements** Click **Remove Dependency** in the **Actions** group on the **Edit** tab. The defined dependency will be deleted and you can move the elements as you like.
- **Change planning direction** On the **Edit** tab, in the **Settings** group, click **Direction**. Select a planning direction, e.g. **Forward Scheduling** or **Backward Scheduling**. Then add the **Project Start** or **End**.

  TIP For more information about the planning direction, see Create planning elements dependency.
- **Stop sending notifications** On the **Edit** tab, in the **Settings** group click **No Notification**. Notifications with project information or regarding project changes will not be sent to the project resources.
- **Create your planning by using templates** Use a previously saved planning as template. On the **Templates** tab, in the **Action** group, click **Import Templates** or choose a saved one in the **InLoox PM Templates** group from the gallery view. You can also save the existing planning by clicking **Save Template** in the **Template** group, on the **Templates** tab.

  TIP For more information on templates, see the category Planning templates.

- **Send a planning as a template via email** On the **Templates** tab, in the **Action** group, click **Send Template by Mail**. In the opened email, enter the recipient and additional text if you like and click **Send**. The planning is already attached to the email.

- **Create a report** On the **Reports** tab you find the features to create a report.
  - In the **Create Reports** group, click **Create Report**. In the **New Report** dialog box, on the **Report** tab, choose a template from the **Use this template** drop-down list. Filter the data that you want to display in the **Planning** tab and then click **Create**.

    TIP For more information on how to issue a report and adjust the data, see Create a report.

  - In the **Reports** group, select a saved report from the gallery view, e.g. **Planning overview**.

TIP For more information on how to add a new budget template to InLoox PM, see Manage report templates.

Adjust the planning view

You can change the layout of an existing planning. There are several features available on the planning page that you can choose from to customize the view.

- **Up** / **Down** By clicking on these vertical arrows, you can move the selected item up and down in the list. You find these buttons in the **Arrange** group on the **Edit** tab.
- **Group** / Create a group by using these buttons. In the **Arrange** group, click . The selected planning element will be grouped one level below.

  On the **Edit** tab, in the **Arrange** group, click to move the selected planning element one group level up.

  TIP For more information about grouping, see Create and edit a summary activity.
- **Expand All** / **Collapse All** On the **View** tab, in the **Common** group, click **Collapse All** to minimize a group in the planning. Click **Expand All** to display it in the detail. Use this feature to get a better overview of your planning.
- **Choose fields** This feature sorts and organizes the project planning by selected data.
  - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column headers.
  - Reset the field per Drag and Drop back into the dialog box.
- **Show critical path** On the **View** tab, in the **Details** group, click **Show critical path**.

  TIP For more information, see Show critical path.
- **Display slack** On the **View** tab, in the **Details** group, click **Display slack**. Now you can see for how many days you can postpone the regarding planning element until it affects the overall duration of the project.
- **Today** Click **Today** in the **Change to** group to switch to the today's view. The plan is positioned so that the **red** day line is on the left side of the Gantt chart.
- **Display All** Click **Display All** in the **Zoom** group to adjust the date interval of the Gantt chart to the project end or start - first and last element.
- **Display the selected planning element only** Select a planning element from the planning list. On the **Zoom** tab, in the **View** group click **Display Selected**.
- **Zoom** / On the **View** tab, in the **Zoom** group click **Zoom in** or **Zoom out** to change the Gantt chart view. The following time intervals are available: years, quarters, months, weeks, days, hours, quarter-hours, and minutes.
- **Sort** You can define the view of the project list by sorting it by criteria such as **Name**, **Start date**, **End date** or **Progress**. On the **View** tab, in the **Arrange** group, click **Sort by**. Select a criteria from the drop-down list, e.g. **Is critical**.
- **Group** On the **View** tab, in the **View** group, click **Group by**. In the drop-down list click on the field you want to group by. The project list will be grouped by the criteria you have chosen.

  NOTE You can remove the grouping by clicking **None** in the **Group by** drop-down list.
- **Filter** On the **View** tab, in the **Arrange** group, click **Filter by**. Select the filter criteria from the drop-down list. Only those planning elements will be displayed in the planning list, which contain the selected criteria.
- **Define outline level** Click **Outline Level** in the **Arrange** group, on the **View** tab. Select an outline level from the drop-down list to collapse or expand groups in the planning view.

Work with the Gantt chart

Get a visual overview of upcoming tasks and the utilization of resources. InLoox PM provides you with different features to adjust the Gantt chart in a quick and comfortable way.

IMPORTANT If you have no reading permissions, you cannot see planning elements in the Gantt Chart.

Article content

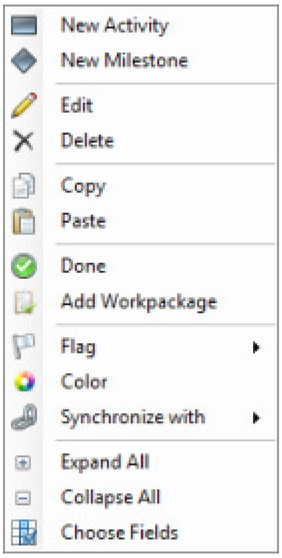
General features of the Gantt chart

The following features for changing and editing the planning can be found in the Gantt chart:

- **Edit a planning element directly in the planning list** You can change the name and the time frame of the element directly in the planning. Click on the planning element row that you want to change and enter the new values.
- **Change the position and duration of planning elements** Press **CTRG** and drag the predecessor / successor relationship between activities and milestones with the mouse.
- **Move or extend planning elements** Keep the **SHIFT** key on your keyboard pressed and drag the planning element in the required position. So, the successor and predecessor will not be influenced by the changes.
- **Center the selected planning elements** Click on the selected element in the Gantt chart.
- **Zoom in and out the view** Press **CTRG** and scroll the mouse wheel for zooming.
- **Edit dependency** Double-click on the link line in the Gantt chart. The **Dependency** dialog box is displayed, where you can change the type of dependency and the lag.

Features in the context menu

- The context menu provides you with almost all basic features that are also on the Planning page, such as **New Activity**, **New Milestone**, **Edit**, **Delete**, **Done**, **Add Workpackage**, **Flag**, **Synchronize with**. It has also such features as **Expand** and **Collapse All**, **Choose Fields**, **Copy** and **Paste**. Right-click in the Gantt chart to open the context menu.



TIP For the detailed description of these features, see Work with the planning.

Information rules in the project list

- The current time is represented by a vertical yellow line.
- The project end is marked in red.
  TIP For more information on how to activate the command Fixed deadline on the Management page in order to see the project end in the planning, see Add other project information.
- A time period is then in red in the planning, if the planning elements are over the project end in the planning.
- A blue bar shows the status of the activity in percent (%).

  TIP For more information on how to set the status, see Create and edit an activity or Create and edit a milestone.

- Working times within start and end dates of the project are colored with a white background.
- Non-working times are colored in grey.
- InLoox PM allows you to start your planning earlier than the project start and to finish it later than the project end. In both cases, the planning for this time period is colored in red.

Keyboard shortcut

- **CTRG+N** Create a new activity.
- **CTRG+N** Create a new milestone.
- **CTRG+A** Select all planning elements.
- **CTRG+C** Copy a planning element into the clipboard.
- **CTRG+V** Paste a planning element from the clipboard to the Gantt chart.
- **CTRG+arrow to right** Moves the selected element to right.
- **CTRG+arrow to left** Moves the selected element to left.
- **CTRG+arrow upwards** Moves the selected element upwards.
- **CTRG+arrow downwards** Moves the selected element downwards.
- Mark the last element in the project plan**+arrow downwards** Creates new planning element.
- **Insert** Inserts new planning element.

Description of the symbols

Symbol	Description
	A check mark shows that the element is marked as completed.
	An alert shows that the element is already overdue and has not been completed yet.
	A flag is used to highlight specific elements.
	The symbol resource shows that resources have been assigned to the element.
	The symbol resources have finished work shows that all resources assigned to the element have completed their tasks.
	A paper clip shows elements to which documents are linked.
	The calendar symbol if constraints have been set for the respective planning element. TIP For more information, see <u>Create and edit an activity</u> or <u>Create and edit a milestone</u>.
	InLoox PM communicates a conflict with this symbol, if a predecessor will be moved.

Create planning elements

Create and edit an activity

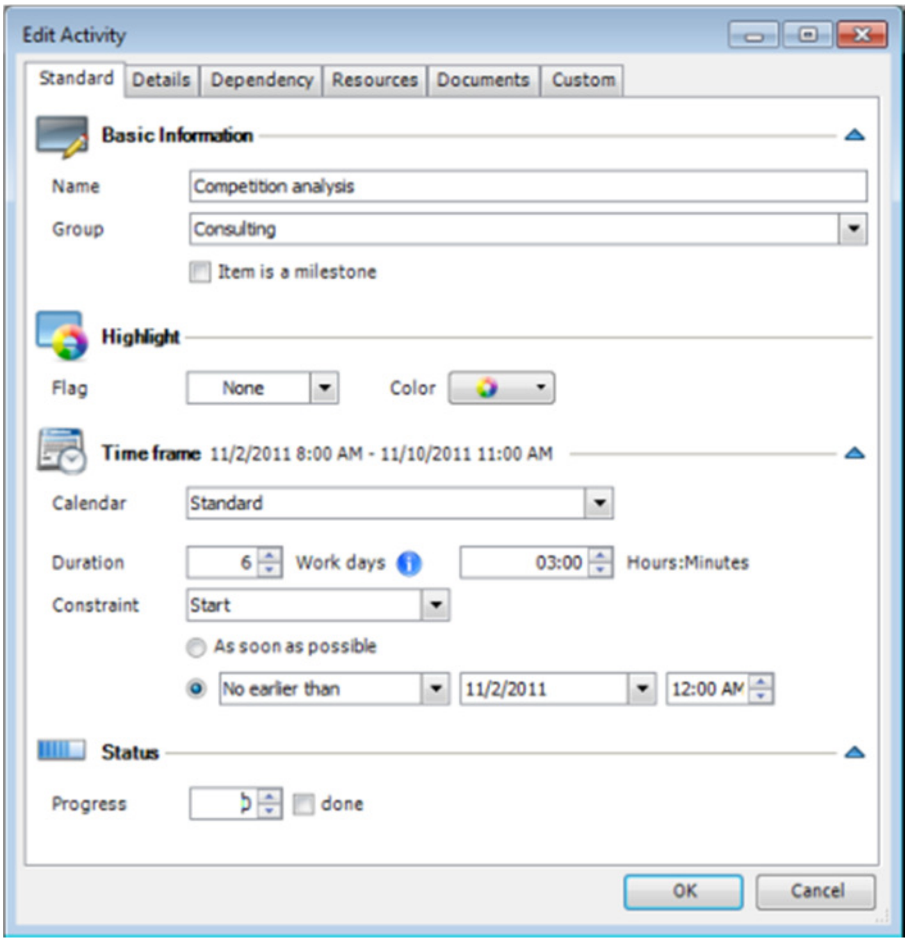
It is recommended to divide the planning into activities. An activity is a planning element with a defined start and end date or a defined duration which is narrowed down content-wise by the underlying work packages. Please follow these steps to divide the planning into several activities:

TIP For more information about work packages, please see the category <u>Work packages</u>.

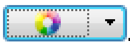
1. Open an existing project or create a new one.

   TIP For more information on how to create a project see <u>Create a project</u>.

2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. Create a planning by adding activities. In the **Planning** page, in the **Edit** group, click **New Activity**.
   NOTE Create your planning faster by adding new activities by using the **Copy** and **Paste** feature in the **Edit** group.
   TIP You can also add another project element like a milestone. For more information, see <u>Create and edit a milestone</u>.
4. In the **New Activity** / **Edit Activity** dialog box, you can adjust the activity to your requirements:



- **General information on the activity on the Standard tab**
  1. In the **Basic information** area, in the **Name** box, type a name. In the **Group** box choose a group to which the activity belongs.

     TIP Each group has an internal price per hour. You can change this price/group or add a new one via the InLoox PM options. For more information, see Generate and edit groups.
  2. In the **Basic information** area, you can also define whether a planning element is a milestone. Select **Item is a milestone** check box.
  3. In the **Highlight** area, select from the **Flag** drop-down list a color to mark the activity in the planning list. You can also select a color to mark the activity in the Gantt chart by clicking **Color** .
  4. In the **Time frame** area, define its duration and dependencies regarding other planning elements.
     The current date will be set by default in the new project.
     1. Select **Standard** as a calendar or choose a user-defined working time calendar from the list in the **Calendar** box.

        TIP For more information on how to set a working time calendar, see Create a working time calendar.
     2. In the **Duration** box, enter the duration in days and enter the hours in the box on the right side.
     3. In the **Schedule** box, define the constraints of the activity. Choose between **Start** or **End**.
     4. The constraint **As soon as possible** is set up as default value for the **Start** and **As late as possible** for the **End**. InLoox PM will automatically display the calculated date in the **Time frame** section.

5. Choose below, if you want to set your own date and the constraints. In the drop-down list choose between **On**, **No earlier than**, **No later than**.
   TIP For more information about the dependency and constraints, see Create planning elements dependency.
5. In the **Status** area, define the progress or activate the **done** check box to display the processing status of the activity.

- **More information on the activity on the Details tab**
  1. In the **Description** field enter some important information on the activity, e.g. the targeted deliverables or internal remarks.
     TIPS
     - The information from the **Description** field will be sent via notification to the divided resources. See Display and process work package for more information about the InLoox PM notifications.
     - InLoox PM provides you with a range of formatting features. For the detailed description, see Create and change comments in the Customize comments section.
  2. In the **Summary activity** box, select a group or parent, to which the activity belongs.
  3. In the **WBS code** box, enter a work breakdown structure code to identify activities and milestones in large projects.
  4. In the **Location** field, enter a location.
- **Set dependencies between activities / planning elements on the Dependency tab**
  1. Choose from the **Available** list one planning element and click **>>**.
     InLoox PM creates a chronological interdependency between the activity and the selected successor.
  2. The **Selected** list contains all successors of the activity currently being edited. To remove a successor click on the button **<<**.
     InLoox PM consequently deletes the chronological interdependency between the activity and the selected successor.
  3. Define the dependency between planning elements by choosing on the item in the **Selected** list.
     - Click **Edit** and choose between **Start to start**, **Start to end**, **End to start**, **End to end** in the **Edit Dependency** dialog box.
     - Set up a lag in the **Lag** area.
     - Activate the **Negative control** box to create a negative lag.

     TIP For more information about dependencies and lags, see Create planning elements dependency.

     NOTE Click **Collapse** to structure the **Available** list clearly and collapse all groups.

- **Further information on the activity on the Custom tab**
  1. Click in the previously created custom box and enter a new value for it.

     TIP For more information on how to add a new custom field in InLoox PM, see Create a custom field.

5. Click **OK** to save the changes.

NOTE Add Outlook tasks and appointments to the InLoox PM Planning via Drag and Drop. The duration of this new activity is an actual effort drawn from the Outlook task or the duration of the Outlook appointment.

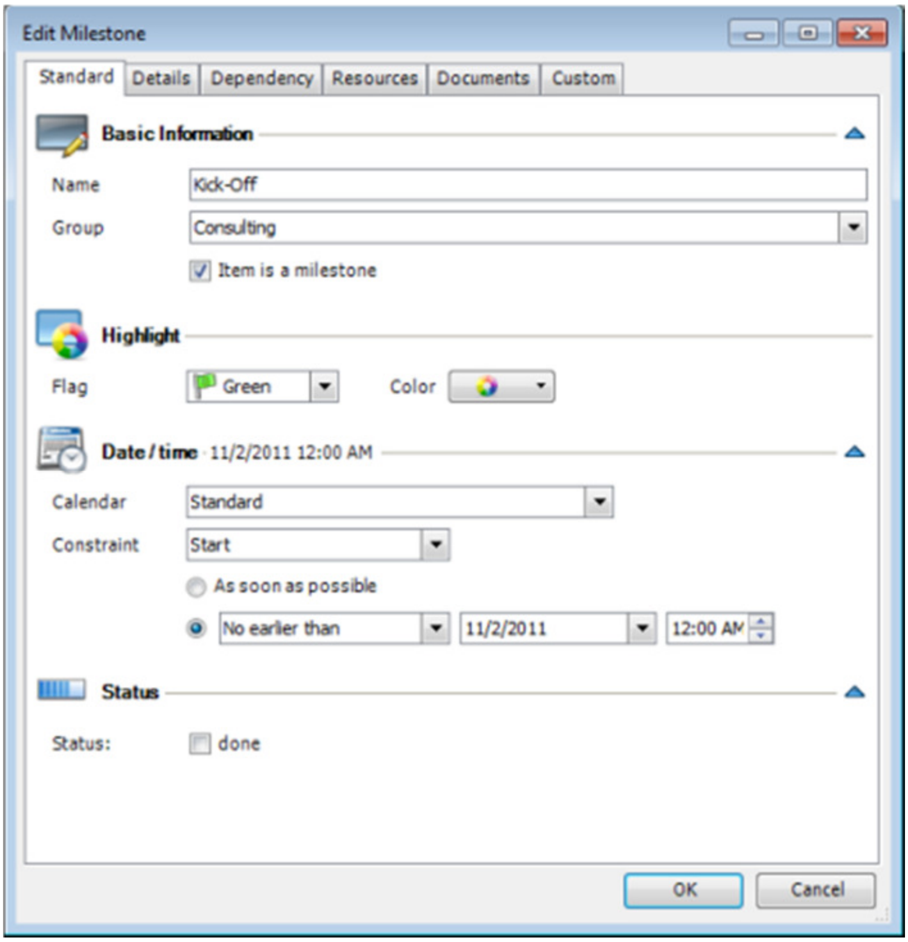
Create and edit a milestone

By defining milestones, you can specify when and how important project results have to be achieved. Please follow these steps to define milestones in InLoox PM:

1. Open an existing project or create a new one.

   TIP For more information on how to create a project, see <u>Create a project</u>.

2. In the project, in the **Start** tab, in the **Section** group, click **Planning**.
3. Create a planning by adding planning items such as milestones. In the **Planning** page, in the **Edit** group, click **New Milestone**.
   NOTE Create your planning faster by adding new milestones by using the **Copy** and **Paste** feature in the **Edit** group.
   TIP You can also add another planning element, e.g. an activity. For more information, see <u>Create and edit an activity</u>.
4. In the **New Milestone** / **Edit Milestone** dialog box, you can use the following options to adjust the milestone:



- **General information on the milestone on the Standard tab**
  1. In the **Basic information** section, in the **Name** box, type a name. In the **Group** box choose a group to which the milestone belongs.
     TIP Each group has an internal price per hour. You can change this price/group

or add a new one via the InLoox PM options. For more information see Generate and edit groups.

2. In the **Basic information** area, you can also define that this planning element is supposed to be an activity, not a milestone. Deactivate **Item is a milestone** check box.
3. In the **Highlight** area, select from the **Flag** drop-down list a color to mark the milestone in the planning list. You can also select the color to mark the milestone in the Gantt chart by clicking **Color** .
4. In the **Date** / **time** area, define its completion date and dependency regarding other planning elements. Unlike an activity, a milestone has no duration.
   The current date will be set by default in the new project.
   1. Select **Standard** as a calendar or choose a user-defined working time calendar from the list in the **Calendar** box.

      TIP For more information on how to set working times or create a new calendar, see Create a working time calendar.

   2. In the **Constraint** box, define the constraints for the dependency between planning elements. Choose between **Start** or **End**.
   3. The constraint **As soon as possible** is set up as default value for the **Start** and **As late as possible** for the **End**. InLoox PM will automatically displays the calculated date on the **Date** / **time** area.
   4. Choose below, if you want to set your own date and the constraints. In the drop-down list choose between **On**, **No earlier than**, **No later than**.
      TIP For more information about the dependency and constraints, see Create planning elements dependency.
5. In the **Status** area select the **done** check box to display the processing status of the milestone.

- **More information on the milestone on the Details tab**
  1. In the **Description** box enter some important information on the milestone, e.g. the wished deliverables or internal remarks.
     TIPS
     - The information from the **Description** box will be sent via notification to the divided resources. See Display and process work package for more information about the InLoox PM notifications.
     - InLoox PM provides you with the range of the formatting features. For the detailed description see Create and change comments in the Customize comments section.
  2. In the **Summary activity** box select a group or parent, to which the milestone belongs.
  3. In the **WBS code** box enter a work breakdown structure code for identifying activities and milestones in large projects.
  4. In the **Location** field enter a location.
- **Set dependencies between milestones / planning items on the Dependency tab**
  1. Choose from the **Available** list one planning item and click **>>**.
     InLoox PM creates the chronological interdependency between the milestone and the selected successor.
  2. The **Selected** list contains all successors of the milestone currently being edited. To remove a successor click on the button **<<**.
     InLoox PM deletes the chronological interdependency between the milestone and the selected successor.
  3. Define the dependency between planning elements by choosing on the item in the **Selected** list.
     - Click **Edit** and choose between **Start to start**, **Start to end**, **End to start**, **End to end** in the **Edit Dependency** dialog box.
     - Set up a lag in the **Lag** area.
     - Activate the **Negative control** box to create a negative lag.

TIP For more information about the dependency and lag, see Create planning elements dependency.

NOTE Click **Collapse** to make the **Available** list clearly and collapse all groups.

- **Further information to the milestone on the Custom tab**
  - Click in the previously created custom box and enter a new value for it.
    TIP For more information on how to add a new custom field in InLoox PM, see Create a custom field.

5. Click **OK** to save the changes.

Create and edit a summary activity

You can organize and structure the existing planning by using summary activities. A summary activity summarizes several related single activities to a superordinated activity. This leads to a clearly structured project plan.

Article content

Create a summary activity

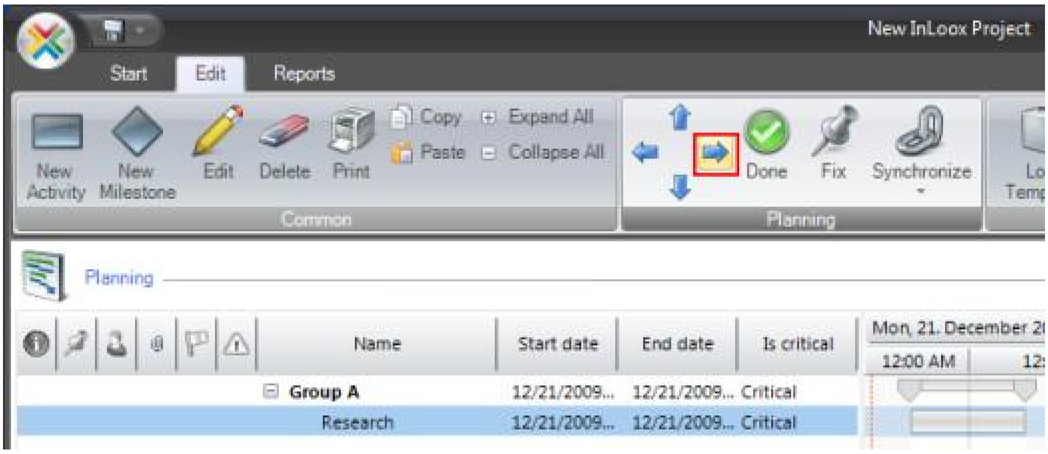
To create a summary activity proceed as follows.

1. Open an existing project or create a new one.

   TIP For more information on how to create a project see Create a project.

2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. Select the activities and milestones that you want to subordinate and click **Group** in the **Grouping** group.

   TIP For more information on how to create a planning, see Create and edit an activity and Create and edit a milestone.
   InLoox PM changes the activity above to a summary activity.



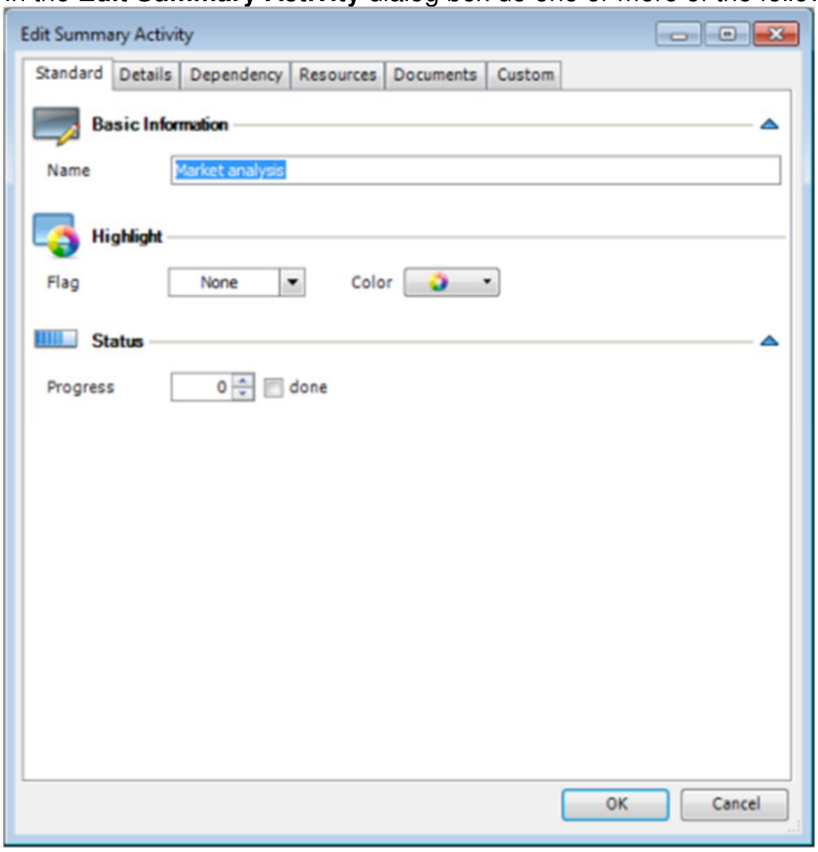
NOTES

- 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 items at lower levels.

Edit a summary activity

To edit a summary activity proceed as follows:

1. Right-click on the selected activity and click **Edit** in the context menu. For more information on how to create a project see Create a project.
2. In the **Edit Summary Activity** dialog box do one or more of the following:



   - **General information on the summary activity on the Standard tab**

1. In the **Basic information** area, in the **Name** field, type a name for the summary activity.
2. In the **Highlight** area, select from the **Flag** drop-down list a flag color to mark the summary activity in the planning.
3. In this area, you can also select the color to mark the summary activity in the Gantt chart by clicking **Color**.
4. In the **Status** area, define the progress or select the **done** check box to display the processing status of the summary activity.

- **More information on the summary activity on the Details tab**
    1. In the **Description** field enter some important information, e.g. the planned deliverables or internal remarks.

    TIPS

    - The information from the **Description** field will be sent via notification to the divided resources. See Display and process work package for more information about the InLoox notifications.
    - InLoox PM provides you with the range of the formatting features. For the detailed description see Create and change comments in the Customize comments sector.

    2. In the **Summary activity** box select a group or parent, to which the summary activity belongs to define the hierarchy level.
    3. In the **WBS** code filed enter a work breakdown structure code for identifying activities and milestones in large projects.
- **Further information to the summary activity on the Custom tab**
    1. Click in the previously created custom field box and enter a new value for it.

    TIP

    For more information on how to add a new custom field in InLoox PM see Create a custom field.

3. Click **OK** to save the changes.

Create dependencies between planning elements

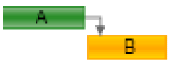
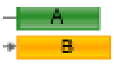
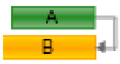
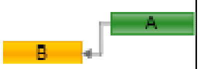
A dependency represents a relationship between two planning elements, where one element with its start or end is dependent on the start or end of the other one. A planning element is a successor, if it is dependent on the other element. A planning element is a predecessor, if the other planning element depends on it. These two types are displayed on the project plan (Gantt chart). The dependency describes a consequence and chronological order between two elements in this chart.

Article content

Types of dependencies

In InLoox PM, you can use the duration of planning elements, different types of dependencies, constraints and positive and negative lags. You can modify the information in the planning by using the features in the Ribbon, New / Edit dialog box and in the Gantt chart. InLoox PM automatically adjusts the schedule and displays information about the relationships between planning elements.

The type of dependency between activities defines how the activities are linked to each other. InLoox PM provides you with the following dependency types:

Dependency	Example	Description
End-to-Start		The activity B begins after the activity A is finished. E.g. the activity A is "Prepare a presentation" and the activity B is "Hold a presentation". In this case the "Hold a presentation" activity cannot begin until the "Prepare a presentation" activity is completed.
Start-to-Start		The dependent activity B cannot begin until the activity A that it depends on is completed. For example, the activity A is "Prepare texts for the web site" and the activity B is "Add screenshots". However, the "Add screenshots" activity begins, when the "Prepare texts for the web site" activity begins.
End-to-End		The activity B cannot be completed until the activity A that it depends on is completed. E.g. the activity A is "Write texts" and the activity B is "Check texts". The "Check texts" activity cannot be completed until the "Write texts" activity is finished.
Start-to-End		The activity B cannot be completed until the activity A that it depends on begins. This type is also called jump sequence. The jump sequence chain forms the latest possible project start. E.g. the activity A is "Print a brochure" and the activity B is "Send for printing". The "Send for printing" activity must be finished before "Print a brochure" begins.

Edit dependencies in the Gantt chart

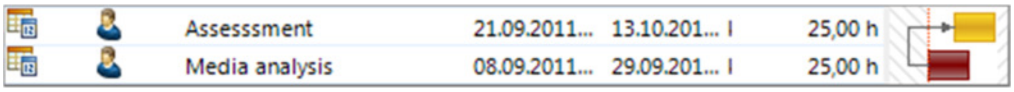
This is how you can generate and edit dependencies:

1. Select the element from your project plan that is supposed to be the successor. Double-click the element or click on the Ribbon, on the **Edit** tab, in the **Edit** group, **Edit**.
2. In the **Edit Activity** or **Edit Milestone** dialog box, click on the **Dependencies** tab.
3. Mark in the **Available** area the planning element that is supposed to be the predecessor. Then click the **>>** button to the **Selected** area.
4. Then click the **Edit** button to define the type of the dependency.
5. Confirm with **OK** twice.

NOTE To edit an already existing dependency between two planning elements you can also double-click the connecting line between those two elements in the Gantt chart.

Lags

InLoox PM provides you with the possibility to determine the lags between two linked planning elements. By using lags, you can define the time interval between two planning elements. You can create a positive or a negative lag.



Positive lag The issue date (start or end) of the successor is **after** the predecessor. A positive lag means "waiting". E.g. you want to set a lag between two activities "Draw a picture" and "Frame a picture", because the paint needs to dry. Create a positive lag by putting in e.g. 2 days. The time lag of 2 days is always constant, even if the predecessor will take 4 days more.

Negative lag If an activity is supposed to start before its predecessor ends, it is necessary to define a negative lag (both activities overlap). A negative lag means "to bring forward". Example: You want to prepare a marketing brochure. Two activities are supposed to overlap so that the activity "Illustrate" starts 3 days before the activity "Write texts" is completed.

Edit the lag in the planning

First, mark the planning element that you want to edit. Then click on the **Edit** tab, in the **Edit** group, **Edit**. In the **Edit** activity dialog box, on the **Dependencies** tab, you can proceed as follows:

- If a dependency has not been defined yet you can select the supposed predecessor in the **Available** area and click him to the **Selected** area by using the button **>>**.
- Mark the respective activity in the **Selected** area and click **Edit**.
- In the **Edit dependency** dialog box, define the type of dependency (see above).
- You can define the lag in working days, hours and minutes.
- Activate the **Negative** checkbox if it is supposed to be a negative lag. Example: A successor is supposed to start three days before the predecessor will end. In this case, you insert a lag of three working days and activate the Negative check box.

Constraints

Use constraints for each activity in order to control the start and end date. InLoox PM provides you with the constraint types you see in the list below. For new planning elements, the constraint **As soon as possible** is set up as default value for the forward scheduling and **As late as possible** for the backward scheduling.

You can combine the different constraint types with the different types of dependencies.

Constraint type	**Description**
As soon as possible	An activity begins as early as possible. This activity is calculated from the start date.
As late as possible	An activity begins as late as possible. This activity is calculated from the end date.

End no later than	An activity will be finished on or before a specified date. Use this constraint to ensure that an activity does not finish after a certain date.
Start no later than	An activity starts on or before a specified date. Use this constraint to ensure that an activity does not start after a certain date.
End no earlier than	An activity will be finished on or after a specified date. Use this constraint to ensure that an activity does not finish before a certain date.
Start no earlier than	An activity starts on or after a specified date. Use this constraint to ensure that an activity does not start before a certain date.
Start on	An activity starts on a specified date. Sets the early and the late start date to the date that you choose and anchors the activity in the schedule.
End on	An activity will be finished on a specified date. Sets the early and the late end date to the date that you choose and anchors the activity in the schedule.

Backward scheduling

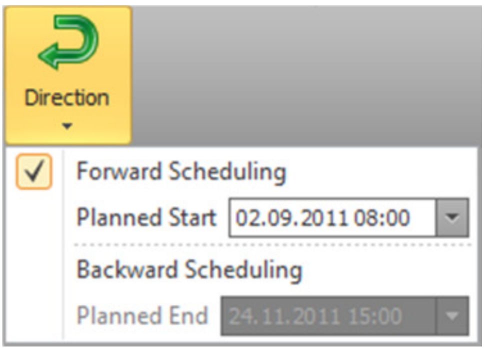
Backward scheduling is a technique to calculate the project plan from the due date. You can assign the work packages in a way that the entire project will be finished exactly to the due date.

In the backward scheduling, a new planning element starts as late as possible. This planning element, which is the last one in the planning chain, stays at the end of the project plan. The idea of the backward scheduling is to determine the latest possible end date of this planning element to meet the planned due date. The latest end and start date of each planning element in the project plan is consequently calculated.

Therefore, the project plan is calculated until the latest possible date of the planning start by considering any necessary lags between planning elements. The slacks, critical planning elements as well as the critical path can be determined due to this calculation.

TIP For more information on the critical path and slacks, see Show the critical path.

Do the following to create a backward scheduling:



1. On the **Edit** tab, in the **Settings** group, click **Direction**.
2. Select **Backward Scheduling** from the drop-down list.
3. Enter an end date for the planning. Choose the date in the **Planned End** box.
   InLoox PM calculates the project plan from the end date until the start date.
4. Create the first planning element by clicking **New Activity** or **New Milestone** in the **Edit** group, on the **Edit** tab.
5. This first element is the last one in the project plan and has no successor.

6. Determine the latest completion date of each predecessor in the planning.
TIP For more information on how to create planning elements, see Create and edit an activity and Create and edit a milestone.

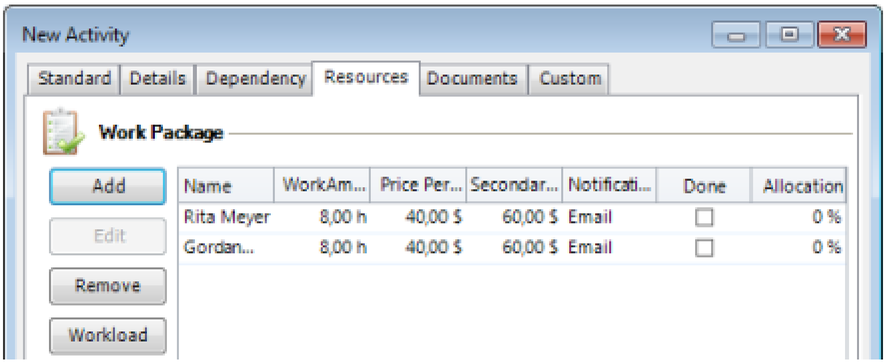
Resources

Add resources

You can assign work packages to your project team members and determine the distribution of work. The procedure of assigning work packages is the same for activities, milestones and summary activities - all features can be found in the dialog box **New** or **Edit** of each planning item.

1. Open the **New Activity** / **New Milestone** or the **Edit Activity** / **Edit Milestone** dialog box of a planning item to add a new resource. Choose one of the following options to open the dialog box:

- In the group **Edit** click **New Activity** / **New Milestone** or **Edit Activity** / **Edit Milestone**.
- Right-click on the project plan area and click **New Activity** / **New Milestone** or **Edit Activity** / **Edit Milestone** in the context menu.
- Double-click an item in the project plan.

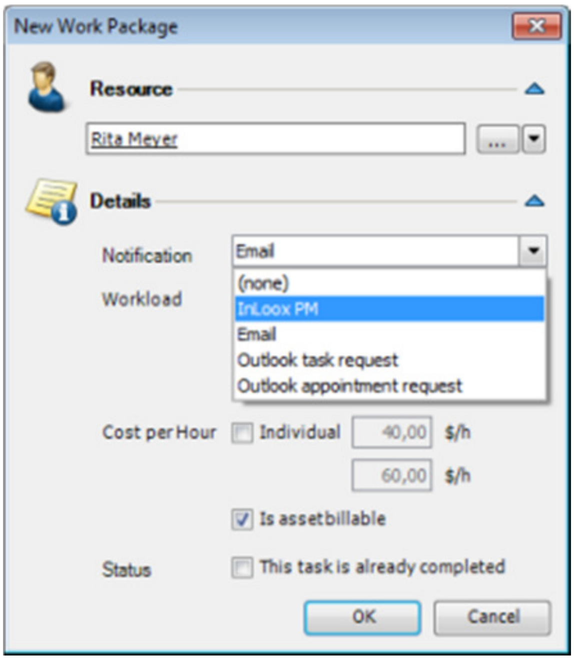


2. Click the **Resource** tab.

3. Do one of the following:

- **Add a new resource**:
  1. Click **Add**.
  2. In the **Edit Work Package** dialog box, in the **Resource** box, click ... .
     NOTE Use the **quick selection** to add a new resource. Click the **Arrow** . You can see in the drop-down list all resources, that have been added to the project.
  3. In the **Select Contact** dialog box choose one name from the list. InLoox PM provides you with the InLoox PM address book as well as with the contacts from Microsoft Outlook and Exchange Server.
     TIP Use the **Skills** feature to assign resources according to their skills. Click the **Search by Skills** drop-down list and select the respective check box. Then select a resource from the list and click **OK**. For more information see Assign skills to resources.
  4. Click **OK**.
     In the **Resource** box the new name will be displayed.

- **Notify a resource**:
    1. In the **New work package** dialog box choose the notification type from the **Notification** drop-down list.



    2. Choose the notification type from the **Notification** drop-down list.
    3. The notification determines when and how an added resource will be informed about the details of this work package.
       Choose one of the following: (**none**), **InLoox PM**, **Email**, **Outlook task request**, **Outlook appointment request**. For more information, see the category Budget overview.
    4. TIP For more information about notification types, see Display and process work packages.
    5. Change the workload of the resource (optionally) in the **Workload** area.
       You will see the workload of the resource in percent (%) during the defined time period. The effort determines the planned time and costs on the **Budget Overview** page, in the **Budget Overview** area, in the **Planned expenses (resources)** column.
    6. TIP For more information see the category Budget overview.
    7. Select the **Individual** check box in the **Cost per hour** area and set an individual hourly rate for the resources, if you want to ignore the group cost rate. Type the respective values in the **Purchase price** and in the **Selling price** field.
    8. The **Is asset billable** check box is selected automatically to include the resource costs of this work package to the expenses (plan, resources).
    9. Select the **This task is already completed** check box in the **Status** area. The **status** shows, whether the particular resource has completed his/her task.
    10. Click **OK**.
- **Edit a resource**:
    1. In the **New Activity** / **New Milestone** or the **Edit Activity** / **Edit Milestone** dialog box, on the **Resource** tab, choose the resource's name from the **Name** list.
    2. Click **Edit** and make your entries in the dialog box.
    3. Click **OK**.
- **Remove a resource**:
    1. In the **New Activity** / **New Milestone** or the **Edit Activity** / **Edit Milestone** dialog box, on the **Resource** tab, choose the resource's name from the **Name** list you want to remove.
    2. Click **Delete.**
- **Check the work amount**:

1. In the **New Activity** / **New Milestone** or the **Edit** dialog box, on the **Resource** tab, click **Work amount (h)** to open the **Resource overview**.
   The **Resource overview** displays an overview of all resources involved in one particular project or in all projects.
   TIP For more information see Open and manage the resource overview.
2. Click **Close**.

Assign skills to resources

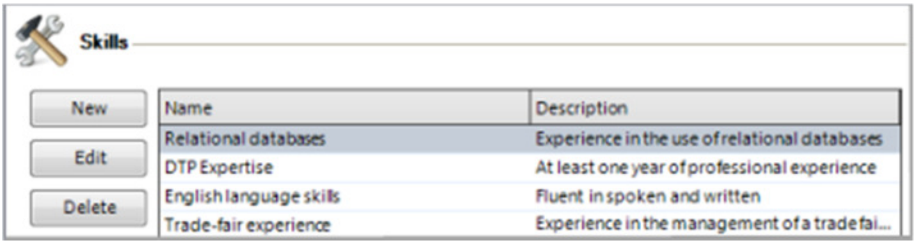
Using the InLoox PM skill management, you are able to assign any qualifications and skills (such as language skills, special knowledge of industry sectors, certifications and many more) to project members. Consequently, you can search for team members with certain skills in your company and deploy them for specific project tasks.

And this is how you can generate skills in InLoox PM and assign them to certain project members:

1. Open the **InLoox PM options** dialog.

   TIP For more information about how to open the InLoox PM options, please see Open the InLoox PM options.

2. Under **Planning**, click **Skills**. On the right side, you will find the **Skills** area as well as the **Skill Assignment** area.



1. **Skills**
   - To create a new skill, please click **New** in the **Skills** area. In the **New Skill** dialog box, in the **Name** field, you can name the respective qualification and add a description in the **Description** field. Please confirm with **OK** and the newly created skill will appear in the list.
   - To adapt an already existing skill click the respective skill in the list and click **Edit**. You are now able to change the naming of the skill in the **Name** field and to change the description of the skill in the **Description** field. Confirm with **OK** and the changed entry will appear in the list.
   - To delete an already existing skill permanently, click the respective skill in the list, then click **Delete** and confirm with **Yes**.
2. **Skill Assignment**
   - First, click the skill in the list in the **Skills** area that you want to assign to a project member.
   - Then click **New** in the **Skill Assignment** area.
   - In the **InLoox PM Skill Assignment** dialog box, click ... to select a resource. Mark the respective name in the list and click **Select** and then **OK**. Then activate the check box(es) of the skill(s) in the **Skills** area that you want to assign. Click **OK** and the newly created assignment will appear in the list.

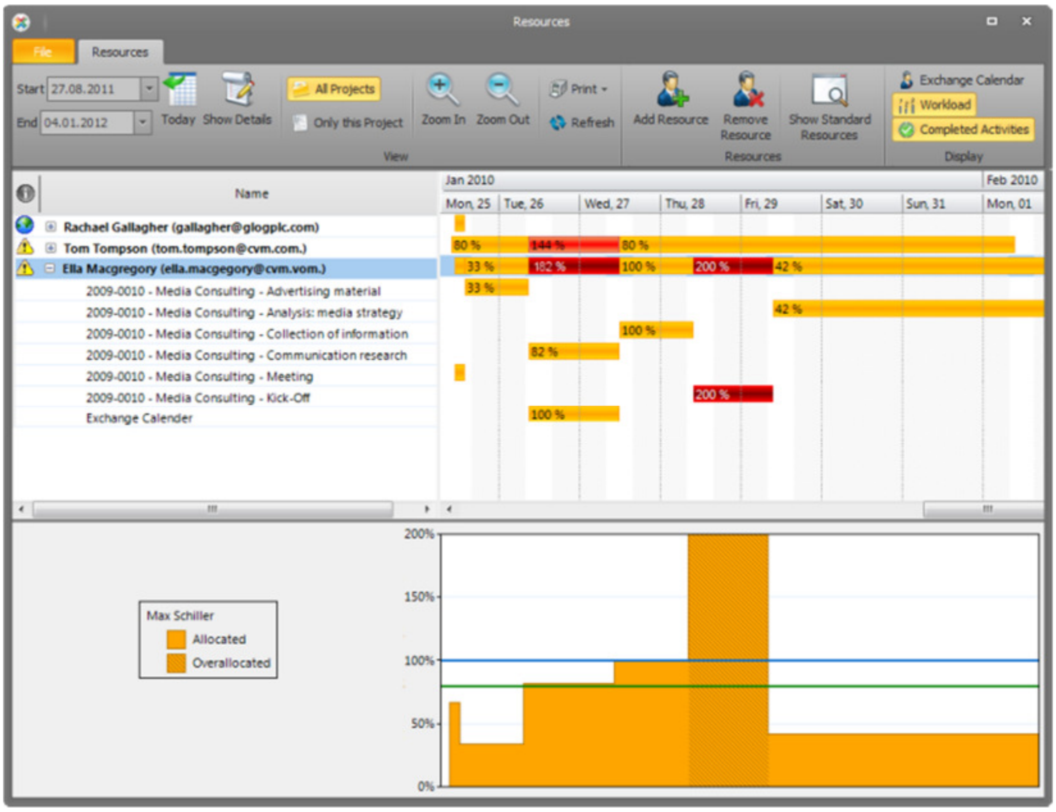
- To modify the assignment, mark the respective entry in the **Skill Assignment** area and click **Edit**. To select a different resource, click [...] and mark the respective name in the list and click **Select**, **OK**. To modify the assigned skills, activate or deactivate the check boxes of the respective skills.
- To remove an assignment permanently from InLoox PM, mark the entry in the list, click **Delete** and confirm with **Yes**.

NOTE As soon as you have created a skill entry in the InLoox PM options and you have assigned it to one or several resources, you can search for the respective skill anywhere you can add a resource in InLoox PM.

Call up and manage resources

In the resource overview, you can control the resource utilization. Resources can be employees or objects used for work such as rooms, vehicles or machines. InLoox PM differentiates between internal resources (i.e. Exchange Server mailboxes) and external resources (i.e. email and fax contacts). InLoox PM uses the free/busy-feature of Microsoft Exchange Server for internal resources and integrates the information (busy, tentative and out of office) into the workload diagram.

1. Open the **Resources overview**.
2. There are different options to open the **Resources overview**:
   - On the InLoox PM tab, in the **Views** group, click **Resources**.
     Keyboard shortcut Press CTRG+O.
   - In the planning, click on an existing activity or milestone, or create a new planning element. In the dialog box, on the **Resources** tab, click **Work amount (h)**.
     In this case, the **Resources overview** displays the utilization information on the selected planning element.



3. Do one or more of the following:
    - **Check resource** Click on the resource that you want to check.
      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.
    - **Change the workload of the resource** Open the corresponding planning element in the planning and change the data, e.g. time. On the **Resources** tab, click the respective resource and change its parameters.
    - **Display resource project-related or system-wide** In the **View** group, choose between **All Projects** or **Only this Project**.
    - **Show work package details** Choose one work package from the list and click **Show Details**.
    - **Show standard resources** In the **Display** group choose this command to display the ressources added to the project.

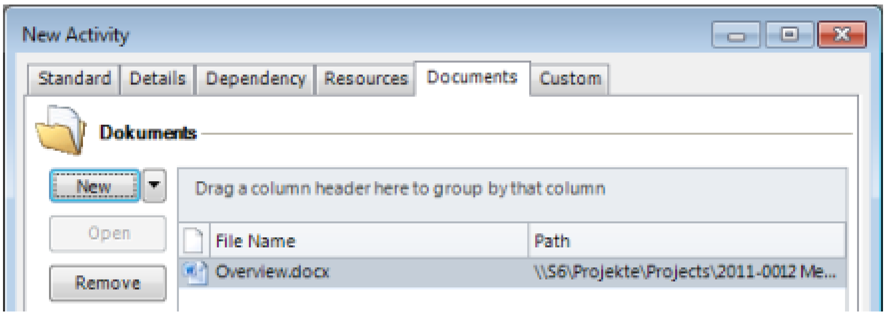
    TIPS

    - For the detailed description of the other features in this view, see Work with resorces.
    - For more information about resources, see the category Resources.

Add documents

You can add the related project documents to the planning elements. So, these documents are available for all users. The procedure of adding a document is the same for an activity, a milestone and summary activity - all features are in the dialog box **New** or **Edit** of each planning element.

1. Open the **New** / **Edit** dialog box of a planning element to add a document. Choose one of the following options to open this dialog box:
    - On the **Edit** tab, in the **Edit** group,click **New Activity** / **New Milestone** or **Edit**.
    - Right-click on the **Planning** area and click **New Activity** / **New Milestone** or **Edit** in the context menu.
    - Double-click a planning element.



2. Click the **Documents** tab. Choose one of the following options:
    - **Add new document**:
        1. Click **Add**.

        TIP For more information on how to add a document, see Create and edit a document.

2. Click **OK**.
   Now, the added document is displayed in the project plan with a paper clip . Click this symbol to open the document. This document is also saved on the **Documents** page.

- **Add a previously saved document from the Document page**:
  1. Click the **Arrow** next to the **Add** button.
  2. In the drop-down list, select **Link**.
  3. On the **Select Entry** dialog box, choose a document and click **OK**.
- **Open a document**:
  1. In the **Documents** area, choose a document from the list
  2. Click **Open** or double-click the item.
- **Remove a document**:
  1. Choose a document from the list on the **Documents** page that you want to remove.
  2. Click **Delete**.

TIP You can link files with the InLoox PM project plan on your local computer or on a server. If you are a team member, specify the server path for the link to give access to all team members. For more information, see the category Documents.

Show the critical path

The critical path marks activities and milestones, which in case of delay immediately lead to the exceeding of the planned project end.

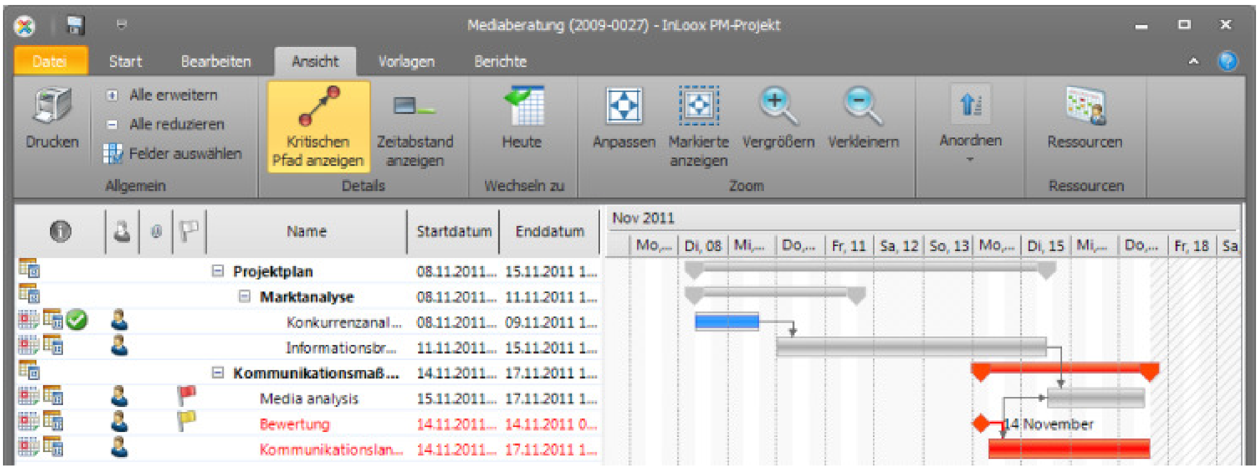
You can display the critical path only in an already existing planning.

TIP For more information on how to create a planning, see the category Create planning elements.

1. Öffnen Sie ein bestehendes Projekt oder erstellen Sie ein neues.

   TIPP Über die Möglichkeiten, wie Sie ein neues Projekt anlegen können, erfahren Sie mehr unter Anlegen eines Projekts.

2. Im Projekt, auf der Seite **Betreuung**, in der Gruppe **Bereich** klicken Sie auf **Planung.**
3. Auf der Registerkarte **Ansicht** in der Gruppe **Details** klicken Sie auf **Kritischen Pfad anzeigen**.



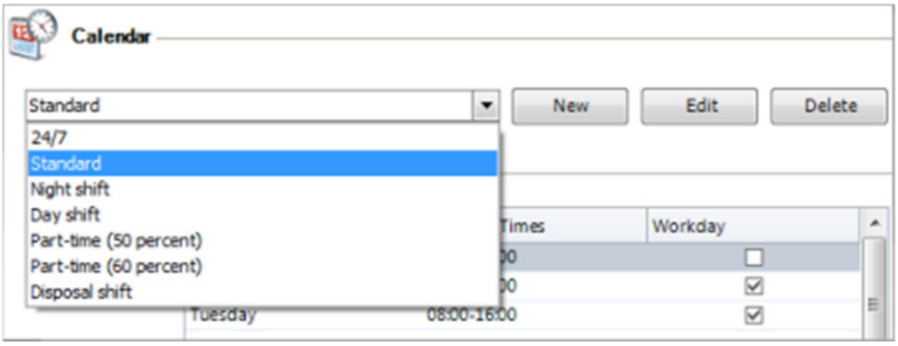
HINWEISE

- Der kritische Pfad wird immer rot markiert und die farbigen Kennzeichnungen werden ausgeblendet.
- Sie können auch mithilfe des Befehls **Puffer anzeigen** sehen, um wie viele Tage Sie die Planungselemente verschieben können, bis sie kritisch sind. Auf der Registerkarte **Ansich**t in der Gruppe **Details** klicken Sie dafür auf **Puffer anzeigen**.
- Planungselemente, die dem kritischen Pfad angehören, werden im Projektplan in der Spalte **Ist kritisch** als "kritisch" angezeigt.

Set a work time calendar

InLoox PM adapts to the working times of your company. In the InLoox PM options you can set individual working time models to display for example part-time work, shift work or weekend work.

1. Open the dialog box **InLoox PM Options**.
   TIP For more information, where you can find the InLoox PM options, see Open the InLoox PM options.
2. Under **Planning** click **Working times**. On the right side, you see the **Working times** area.



3. In each area you can choose the following options:
   1. **Calendar**
      - **Add a new calendar** On the **Calendar** area, click **New**. On the **New Calendar** dialog box, in the field **Name** enter a new name and click **OK**.
        Now, the new calendar is displayed in the drop-down list in the **Calendar** area. You can add to the calendar **Working times**, **Working days** and **Days off**.
      - **Edit a calendar** Select a calendar from the drop-down list in the **Calendar** area and click **Edit**. On the **Edit Calendar** dialog box, in the **Name** field, change a name and click **OK**.
      - **Remove a calendar** Select a calendar from the drop-down list in the **Calendar** area and click **Delete**.
   2. **Working times**
      1. Select one day from the list and Click **Edit**.
      2. In the dialog box **Edit Working Day**do the following:
         - Select tthe **No workday** option for a day off.
         - Select the **Workday**option for a work day.
           1. Select the **24 hours** option for the permanent operation.
           2. Select the **Working times**option to define them.
              1. Click **Add** and enter **Start** and **End** in the **New Working Time** dialog box. Click **OK**.
              2. To edit already existing working times, select an entry from the list and click **Edit**.

            3. To delete existing working times permanently, select an entry from the list and click **Remove**.
        - Click **OK**.
    3. **Days off**
        - In this area, you can add or import new days off and edit or delete the existing ones.

          TIP For more information see <u>Set days off</u>.
    4. **Working day**
        - Define the number of hours of a working day in the **One working day contains...hour(s)** box. This parameter helps the user to enter time periods for activities and workloads for work packages.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

NOTES

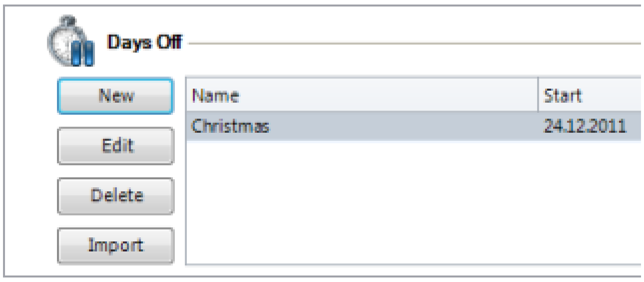
- If the **working times** are changed or **working days** are activated or deactivated, the internal costs of a project are only then changed when the relevant element is opened and the project saved.
- The billing of internal costs on the planning page only takes account of the number of working hours 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.**

Set days off

In the InLoox PM options, you can set days off and import Microsoft Office Outlook holidays files (*.hol).

1. Open the **InLoox PM Options** dialog box.

   TIP For more information on how to open the InLoox PM options, please see <u>Open the InLoox PM options</u>.
2. Below **Planning**, click **Working times**. On the right side you see the **Days off** area.



3. Do one of the following:
    - **Set a new day off**
        1. In the **Calendar** area, choose a calendar from the drop-down list.
        2. In the **Days off** area, click **New.**
        3. Type a name in the **Name** field, in the **New Non Working Time** dialog box.
        4. Select a date in the **Start** field.
        5. You can optionally choose the **End** to define the end or to add several days off.
        6. Select the **Full-time** option, if you want to define the whole day as a day off.
        7. Select the **Available in all calendars** check box, if you want to apply this day off for all calendars.

8. Click **OK**.

NOTE Define the days off per calendar, e.g. to define different holidays in different calendars (such as country-specific holidays).

- **Edit items** Choose one day off from the list and click **Edit** to edit it.
- **Delete items** Choose one day off from the list and click **Delete** to remove it permanently.
- **Import items** Choose one day off from the list and click **Import**.
  InLoox PM loads a **Microsoft Office Outlook holidays file** (*.hol).

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Planning templates

Import a planning template

Use already existing Microsoft Project files for a new project planning. A planning template includes milestones, activities and summary activities.

TIP For more information on how to create a planning template, see Save a planning template.

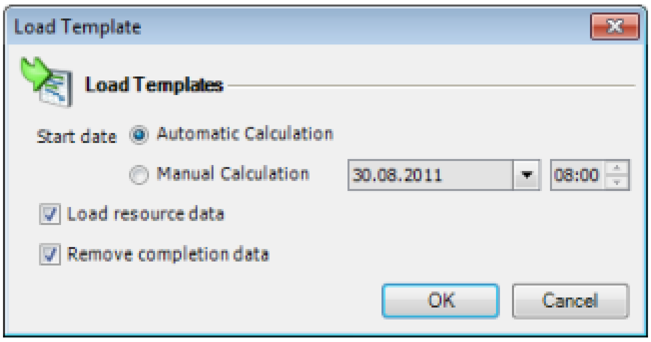
1. Open an existing project or create a new one.

   TIP For more information on how to create a project, see Create a project.

2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. On the **Planning** page, on the **Templates** tab, in the **Action** group, click **Import Templates**.
4. In the drop-down list choose one of the following file formats:
   - **MS Project File**
   - **MS Project Exchange File**
   - **XML File**
   - **InLoox PM Planning File**

   You can load a template from your local data in these formats.

5. You can also select the saved templates in the **InLoox PM Templates** group in the gallery view.
6. If you have chosen an already saved template, the **Load Template** dialog box will be displayed:



1. Choose between **Automatic** and **Manual Calculation**to define the working times of the related work packages.
   - **Automatic calculation** when using automatic calculation, all existing constraints will be replaced by a "Start as soon as possible" constraint. The activities and milestones are allocated in accordance with the planned start date from the

planning settings (under “Direction”), independently of the project start date on the management page.
 If backwards planning is being use, all existing constraints will be replaced by a “Finish as late as possible” constraint. The activities and milestones are allocated in accordance with the planning end date from the planning settings (under “Direction”), independently of the project end date on the management page.

- **Manual calculation** manual calculation takes the start date as the basis for the first element in the planning. All subsequent elements will reflect the structure of the template. In order to do this, all constraints in activities and milestones will be removed and replaced with a “Start On” constraint. The automatic planning functions are not used.

2. Define the **Start date** as well as **Work times** for the planning elements if you have chosen the manual calculation.
3. Select the **Load resource data** check box to load the resource information of a planning.
4. Deactivate the **Remove completion data** check box, if you don't want to see progress information and resources in your planning.
5. Click **OK**.

NOTES

- The start date determines the date for the first (earliest) activity or milestone from the selected template. InLoox PM places the other items according to this time.
- You can load more than one template to the same planning. The multiple loading of the same template is also possible.
- The following templates such can also be loaded:
  - Microsoft Project (MPP)
  - Microsoft Project XML (XML)
  - Microsoft Project Exchange (MPX)

Save a planning template

You can easily exchange project schedules between InLoox PM and Microsoft Project. InLoox PM users do not need any additional software - neither is Microsoft Project necessary.

And this is how you do it:

1. Open an existing project or create a new one.

   TIP For more information on how to create a project, see Create a new project.

2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. On the **Planning** page, on the **Template** tab, in the **Action** group, click **Save Template**.
4. In the drop-down list you can choose between the following formats:
   - **InLoox PM**
   - **Picture**
   - **Other Format**, e.g. **Extensible Markup** (XML).
5. If you choose the InLoox PM format the **Save Template** dialog box will be displayed.

6. In the **Enter the name of the template** field, type a name.
7. Click **OK**.
   The template is saved in InLoox PM. InLoox PM saves not only planning elements, but also all resources and their notification options.

   TIP For more information on how to change a template, see Manage planning templates.

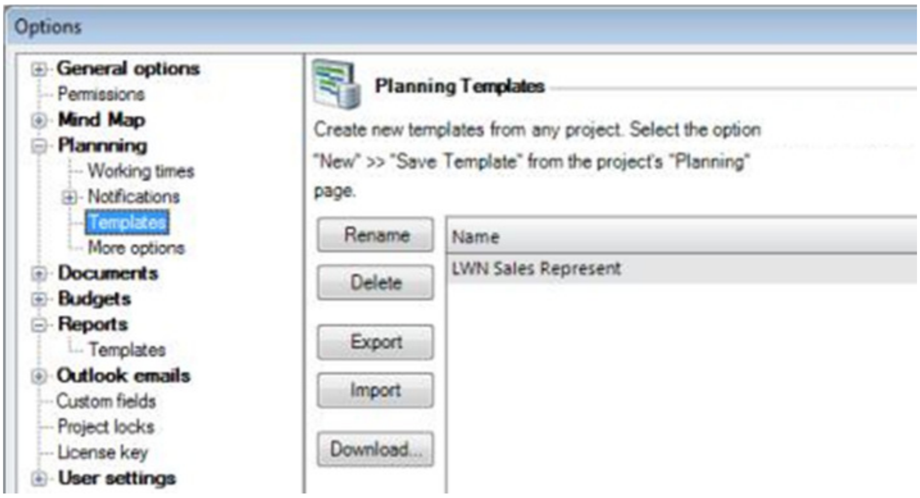
Manage planning templates

In the InLoox PM options, you can edit planning templates that you have already saved.

NOTE For more information on how to create a planning template, see Save a planning template.

IMPORTANT To manage templates it is necessary to have InLoox PM administrator permissions.

1. Open the **InLoox PM Options** dialog box.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Below **Planning**, click **Templates**. On the right side you will see the **Planning Templates** area.



3. Do one of the following:
   - Change the name of the saved template. Choose one template from the list and click **Rename**. In the **Rename Planning Template** dialog box, in the **New Name** field type a new name for this template and click **OK**.
   - Remove permanently one template from InLoox PM. Choose one template from the list and click **Delete**.
   - Save a template in your local documents. Choose one template from the list and click **Export**.

- Load a template from your local data. Click **Import** and choose a template in the **Load Planning Template** dialog box, then click **Open**.
- Click **Download** to download a planning template from the InLoox website.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Customize a notification template

Notifications enable the communication of project information. You can send them to those resources, whom the project planner wants to inform automatically.

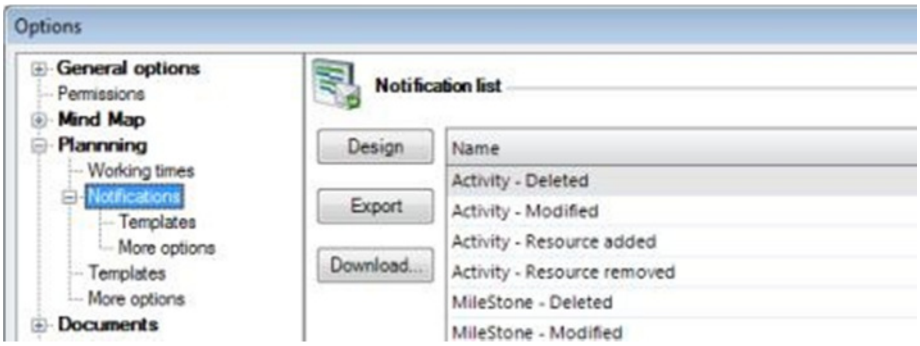
InLoox PM provides you with various kinds of notifications for each milestone, activity and summary activities. Resources can receive information via email, task request or InLoox PM reminder. The notification templates contain predefined text elements which can be changed or deleted.

TIP For more information on how to notify a resource about a planning element, see Add resources.

1. Open the dialog box **InLoox PM Options**.

   TIP For more information, about where to find the InLoox PM options, please see Open the InLoox PM options.

2. Below **Planning**, click **Notifications** and then **Templates**. On the right side you see the **Notification list** area.



3. Choose one of the following options:
   - Edit the notification text by clicking **Design**. In the **InLoox PM Notification Designer**, you can make the respective changes.

     NOTE For more information on how to work with the InLoox PM Notification Designer, see **Designer Help**, which you can find there.

   - Save a template in your local documents. To do this, choose one template from the list and click **Export**.
   - Click **Download** to download the planning templates from the InLoox website.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

TIP For a detailed description of the different notification types, please see Customize notification types.

Customize notification fields

There are proper templates for each notification type. Customize individually each notification template with different fields. A **field** is a **wild card** for project information. Fields can be added or deleted from a notification template.

1. Open the **InLoox PM options**.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Click **Planning**, **Notifications**, **Templates**.
3. On the right sight, you see the **Notification list**.
4. Select a template type from the list and click the **Design** button to get to the **InLoox PM Notification Designer**.
5. On the right side, you see the list of variables. Click **Variables**. Now, you see a list of all available fields.

For more information, please see the Notification Designer Help.

The following fields are available for notifications:

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. TIP An internal price per hour is in file for each group. For more information on how to customize the internal prices and the available groups, please see Generate and edit groups.
IsProjectEndDateFixed	Fixed deadline project	Specifies whether the project has a fixed completion deadline.
Link	Linked documents	Document paths (text-only) of the planning item.
Location	Location	Free text field. States where the planning element is to be carried out.
PlannerName	Name of planner	The name of the project planner, as stored in Outlook, e.g. Rita Meyer.
Progress	% completed	Completion degree 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 of the customer's name in the project.
ProjectEnd	Project end	End date of the project.
ProjectName	Projekt Name	Short, free description of the project. The project name can be used several times.
ProjectNote	Project name	Multiple-line free text for the concise recording and communication of the significant aspects of the project. You can

		create a comment in the **Comments** area of the **Management** page. TIP For more information on project comments, see Create and change comments.
ProjectNumber	Project number	Unique number to identify the project. TIP For more information on how to customize the format of this number, please see Adjust the project number.
ProjectPriority	Project priority	Priority of the project.
ProjectStart	Projekt Start	Start of the respective 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. Max Schiller.
ResourceList	Resources	List of all resources involved in a planning element, including the email address, e.g. Max Schiller (max.schiller@firma.de) Gordon Newman (gn@mailaddress.com).
StartDate	Start planning element	Start date of the planning element.
WorkAmount	Work amount	Work amount, which is done by the recipient resource of the planning element.
Projectstate	Project status	Specifies the state of project development

Customize notification types

You can notify resources via **e-mail**, **task request** or **meeting request**. There are templates for the different types of planning elements and events which you can customize.

Please proceed as follows to customize a notification template:

1. Open the **InLoox PM options**.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Click **Planning**, **Notifications**, **Templates**.
3. On the right sight, you see the **Notification list**.
4. Select a template type from the list and click the **Design** button to get to the **InLoox PM Notification Designer**.
5. Now, you can modify the selected notification template.

For more information, please see the Notification Designer Help.

Message name	**Application**
Activity - modified	InLoox PM generates this message, if an activity is changed in the **New Activity / Edit Activtiy** dialog box or directly or indirectly in the project plan. TIP For more information on how to edit an activity, see Create and edit an activity.

Activity - resource added	InLoox PM generates this message, if a resource is added to an activity using the **New Activity** / **Edit Activtiy** dialog box. TIP For more information on how to add a resource, see Add resources.
Activity - resource removed	InLoox PM generates this message, if a resource is removed from an activity using the **New Activity** / **Edit Activtiy** dialog box. TIP For more information on how to remove a resource, see Add resources.
Activity - deleted	InLoox PM generates this message, if an activity is deleted from the project plan, on the **Planning** page. TIP For more information on how to remove an activity, see Create and edit an activity.
Milestone - modified	InLoox PM generates this message, if a milestone is changed using the **New Milestone** / **Edit Milestone** dialog box or directly or indirectly within the project plan. TIP For more information on how to edit a milestone, see Create and edit a milestone.
Milestone - resource added	InLoox PM generates this message, if a resource is added to a milestone using the **New Milestone** / **Edit Milestone** dialog box TIP For more information on how to add a resource, see Add resources.
Milestone - resource removed	InLoox PM generates this message, if a resource is removed from a milestone using the **New Milestone** / **Edit Milestone** dialog box. TIP For more information on how to remove a resource, see Add resources.
Milestone - deleted	InLoox PM generates this message, if a milestone is deleted from the project plan, on the **Planning** page. TIP For more information on how to remove a milestone, see Create and edit a milestone.
Summary activity - modified	InLoox PM generates this message, if a summary activity is changed using the **New Summary Activity** / **Edit Summary Activity** dialog box or directly / indirectly within the project plan. TIP For more information on how to edit an activity, see Create and edit a summary activity.
Summary activity - resource added	InLoox PM generates this message, if a resource is added to a summary activity using the **New Summary Activity** / **Edit Summary Activity** dialog box. TIP For more information on how to add a resource, see Add resources.
Summary activity - resource removed	InLoox PM generates this message, if a resource is removed from a summary activity using the **New Summary Activity** / **Edit Summary Activity** dialog box TIP For more information on how to remove a resource, see Add resources.
Summary activity - deleted	InLoox PM generates this message, if a summary activity is deleted from the project plan, on the **Planning** page.

	TIP For more information on how to remove a summary activity, see Create and edit a summary activity.

Print a planning

You can also print an existing planning, e.g. in Adobe PDF format. All printing settings and features can be found in the dialog box **Print**. You can choose all settings and options in this dialog box.

1. Open an existing project.
2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. On the **View** tab, in the **Common** group, click **Print**. The **Print** dialog box will be displayed.
4. Do one of the following:
    - Click **Preferences** in the **Select Printer** area to change the paper size, output format or other settings.
    - If you want to specify individual pages or sets of pages to be printed, in the **Page area,** choose the respective options. Then click **Apply**.
5. Click **Print**.

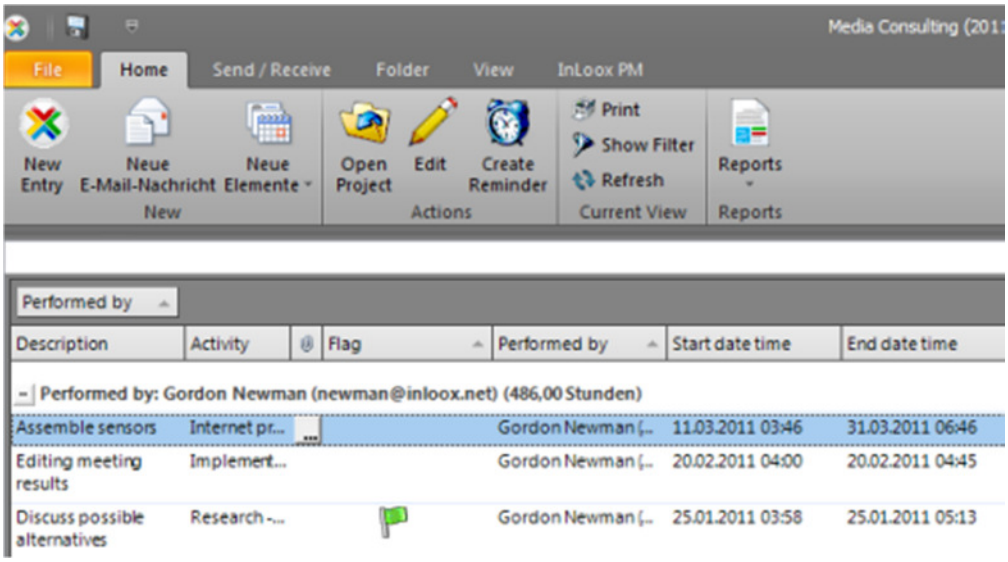
NOTE Be sure that all necessary changes are made before clicking **Print**. The document will be sent directly to the printer after having clicked **Print**.

Time tracking

Work with the time tracking

In the project, in the **Start** tab, in the **Section** group, click **Time Tracking** 

to open the **Time Tracking** page. On this page, in the **Edit** tab, you find the following features:



- **Add a new time tracking entry** On the **Edit** tab, in the **Edit** group, click **New**.

  TIP For more information, see Create and edit a time tracking entry.

- **Edit a time tracking entry** On the **Edit** tab, in the **Edit** group, click **Edit** to add further information to the selected item.
- **Remove a time tracking entry** On the **Edit** tab, in the **Edit** group, click **Delete** to remove the selected entry from the time tracking list.
  NOTE Use multiselection to edit several time tracking entries simultaneously. Click therefore on the first entry that you want to edit. Then, keep the CTRL key on your keyboard pressed and select the other entries that you want to edit. Then right-click to open the context menu and click the command that you want to execute.
- **Copy and paste** Create quickly time tracking entries by using the **Copy** and **Paste** feature in the **Common** group. These features can be found on the **Edit** tab in the **Edit** group.
- **Highlight a time tracking entry** Select one entry from the list and click **Flag** in the **Edit** group, on the **Edit** tab. Choose one colour from the drop-down list.
  Now you can see the selected flag next to the entry in the list.
- **Create a reminder** On the **Edit** tab, in the **Time Tracking** group, click **Create Reminder** to create a reminder in your Outlook calendar.
  TIP For more information, see Create a reminder.
- **Print a time tracking view** On the **View** tab, in the **Common** group, click **Print** to start the quick print feature of the time tracking list.
  TIP For more information about printing, see General features and printing of the project list, in the **Print in the project list** section.
- **Expand or reduce the time tracking view** Change the view by using the **Expand All** or **Collapse All** buttons in the **Common** group on the **View** tab to have a clearly structured time tracking view.
- **Choose Fields** This feature sorts and organizes the project by selected data. This feature can be found in the **Common** group, on the **View** tab.
  - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column header.
  - Reset the fields via Drag and Drop into the dialog box.

- **Create a report** On the **Reports** tab, you can create a report.

- In the **Create** group, click **New Report**. In the **New Report** dialog box, on the **Report** tab, choose a template from the **Use this template** drop-down list. Filter the data in the **Time tracking** tab and click **Create**.

  TIP For more information on how to issue a report and adjust the data, see Create a report.

- In the **Reports** group select a saved report from the gallery view, e.g. **Time tracking**.

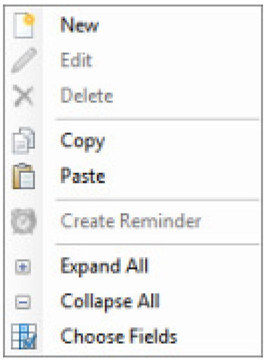
  TIP For more information on how to add a new budget template to InLoox PM, please see Manage report templates.

Information rules in the time tracking list

- A time tracking item can be marked with one of these flags
- A **paper clip** shows that one or more documents are linked to the time tracking item. Click on the **Paper clip** and then on the button to open a list of the linked documents.
- The **total duration** of all items is displayed above the time tracking list.
- The list is sorted by **date** in descending sequence and can be grouped and sorted just like an Outlook list.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the **Time Tracking** page, such as **New**, **Edit**, **Delete**, **Copy** and **Paste** or **Create Reminder.** It has also features such as **Expand** and **Collapse All Groups** or **Choose Fields**. Right-click in the time tracking list to open the context menu.



Keyboard shortcut

- **CTRG+C** Copy a time tracking entry into the clipboard.
- **CTRG+V** Paste a time tracking entry from the clipboard to the time tracking list.

NOTE If the lock icon is displayed in the list, you don't have read permissions. In this case, no time tracking entry will be displayed.

Create and edit a time tracking entry

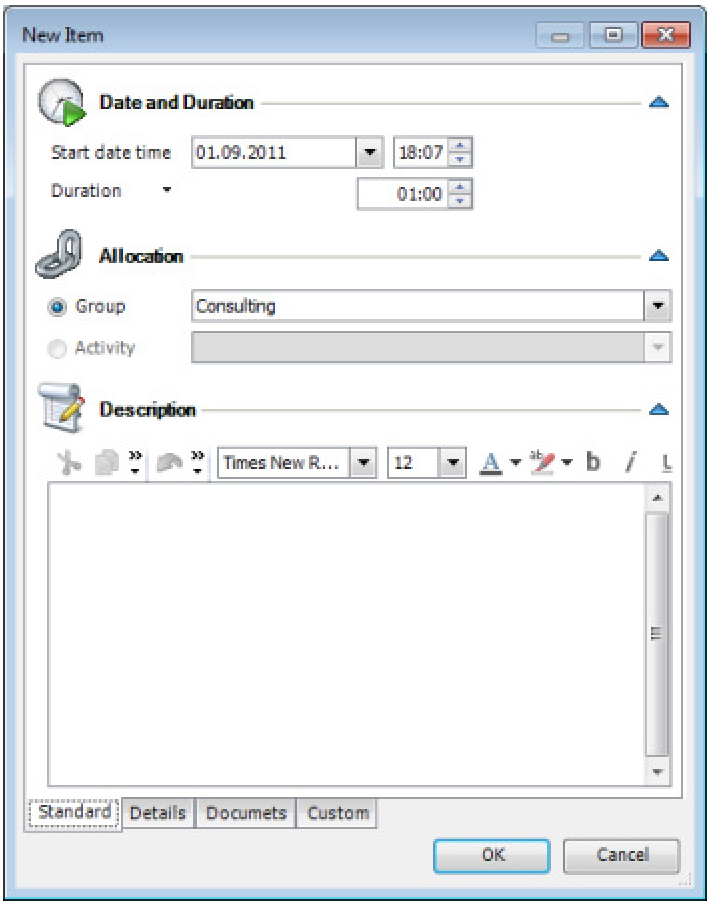
Read here how to post costs and working hours in InLoox PM. The system assigns the effort to the project plan automatically and stores a separate cost record.

If you want to record your personal actual hours, proceed as follows:

1. Open an existing project with an existing planning.

   TIP For more information on how to create a planning, see Create planning elements.

2. In the project, on the **Start** tab, in the **Section** group, click **Time Tracking**.
3. On the **Time Tracking** page, in the **Common** group, click **New.**
4. In the **New Item** dialog box select one of following options:



- **General information on the time tracking entry on the Standard tab**
  - In the **Date and Duration** area select the **Start** and **End date time**.

    NOTE Choose between **Duration** and **End date time** by clicking on one of them in the **Date and Duration** area and choose the other opportunity in the drop-down list.

  - In the **Allocation** area select the **Group** or **Activity** / **Milestone** option from the planning, to which this item belongs.

      - In the **Description** field enter a text, e.g. the location of the service, the team member name, the meeting results or internal remarks.

        TIP InLoox PM provides you with different formatting features for the Description field text. For more information about these features see Create and change comments, in the Customize a comment section.

  - **More information on the time tracking entry on the Details tab**
      - In the **Details** area choose from the **Flag** drop-down list a colour to mark the item in the time tracking overview.
          - Select the **Is billable** control box to bill this item on the **Budget** page. The items with this status are included in the actual revenues of the project budget.
          - In the **Performed by** box choose a name of the person, who carried out the item. Click ... beside **Performed by** and choose a name from the **Select contact** dialog box.

            NOTES

              - InLoox PM saves automatically the name of the person, who created the item or last edited it.
              - Use the **quick selection** to add a new resource. Click the **Arrow** to see all resources in the drop-down list all resources, which have been added to the project.
  - **Adding documents on the Documents tab**
      - On this tab, click **Add** to add a new document.

        TIPS

          - For more information on how to add a document, see Create and edit a document.
          - Now, you can see the added document on the time tracking list marked with a paper clip. Click this symbol to open the document. This document is also saved on the **Documents** page.
  - **Further information on the time tracking entry on the Custom tab**
      - Click in the previously created custom field and enter a new value.

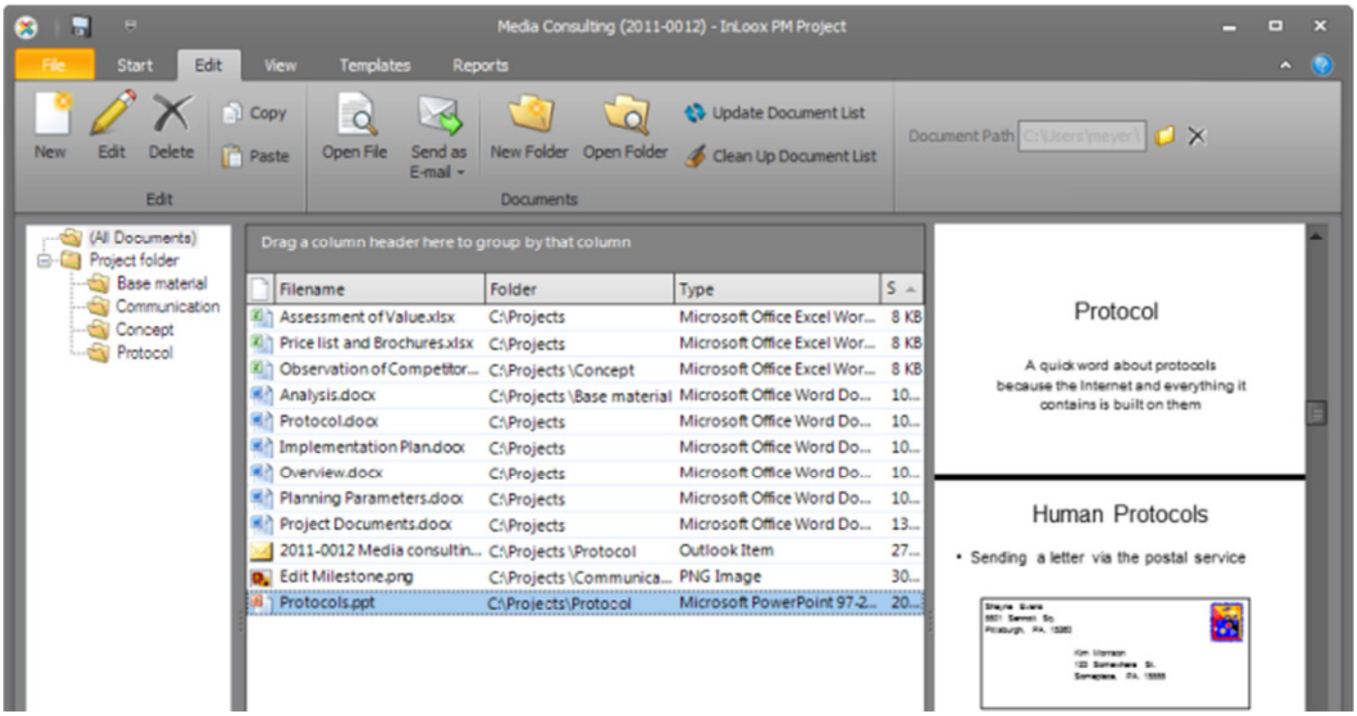
        TIP For more information on how to add a new custom field in InLoox PM, see Create custom fields.

TIP An internal price per hour is in file for each group. For more information on how to customize the internal prices and the available groups, please see Generate and edit groups.

Documents

Work with the document list

In the project, in the **Start** tab, in the **Section** group, click **Documents**  to open the **Document** page. On this page, in the **Edit** tab you will find the following features:



- **Add new document** On the **Edit** tab, in the **Edit** group click **New**.

  TIP For more information see Create and edit a document.

- **Edit a document** On the **Edit** tab, in the **Edit** group click **Edit** to change the document.
- **Remove a document** On the **Edit** tab in the **Edit** group click **Delete** to remove the selected document from the document list on the right side.
- **Copy and paste** Create quickly documents with the help of **Copy** and **Paste** feature on the **Edit** tab in the **Edit** group.
- **Open a document** Choose one document from the document list on the right side. On the **Edit** tab in the **Edit** group click **Open**.

  WARNING You need the administrator permission to open the document.

- **View file properties** On the **Edit** tab, in the **Documents** group click **File Properties** to open them.
  On the **File Properties** dialog box list the tabs to view and change the properties.
- **Send a document via email** On the **Edit** tab, in the **Documents** group click **Send As Mail**. In the drop-down list select **Send Link(s)**, if you want to send only document path, or **Send Document(s)** to send the document as an attachment.
- **Create a new subfolder** Choose a folder from the document folder tree view on the left side. On the **Edit** tab, in the **Documents** group cllick **New Folder**. In the **Create New Folder** dialog box type a new name and click **OK**.

TIP For more options on how to create a new subfolder, see Create a new subfolder.
InLoox PM creates automatically a new subfolder in the document folder view.

- **Open a document folder** On the **Edit** tab, in the **Documents** group click **Open Folder** to open 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 view and the document list by reading all entries of the file store or SharePoint system. This feature is available on the **Edit** tab, in the **Documents** group.

TIP For more information see Create and change the document folder path, in the Create the **Document folder path**.

- **Clean Document Folder** Removes all orphaned entries of the document list. This feature is available on the **Edit** tab, in the **Documents** group.

TIP For more information see Cleaning the document list.

- **Choose the document folder path** On the **Edit** tab, in the **Documents** group click **Folder** .

TIP For more information see Create and change the document folder path.

- **Delete the document folder path** On the **Edit** tab, in the **Documents** group click ✕. InLoox PM selects the document folder anew according to the document folder rule as soon as a new document is added to the project.
- **Print a document list** On the **View** tab, in the **Common** group click **Print** to start the quick print feature of the document list on the right side.

TIP For more information about printing, see Generale features and print of the project list, in the **Print in the project list**.

- **Expand or reduce the document folder view** Change the view with the help of **Expand All** or **Collapse All o**n the **View** tab, in the **Common** group, to make clear the document folder view.
- **Choose Fields** This feature sorts and organizes the project by important data. On the **View** tab, in the **Common** group click **Choose Fields**.
  - On the **Choose Fields** dialog box click one field, e.g. **Outlook sender**, and drag it into the column headers.
  - Reset the fields per Drag and Drop into the dialog box.
- **Change the preview area** InLoox PM provides you with the preview area to view important infomation of each document without openning it.
  - On the **View** tab, in the **Common** group click **Preview Area**.
  - In the drop-down list click **Right** or **Bottom** to set the preview area where you want. Click **Off** to deactivate it.

- **Create a report** On the **Reports** tab you can create a report.
    - In the **Create Reports** group click **Create Report**, in the **New Report** dialog box, in the **Report** tab choose a template from the **Use this template** drop-down list.

      TIP For more information on how to issue a report and adjust the data, see Create a report.

    - In the **Reports** group select a saved report from the gallery view, e.g. **Meeting**.

      TIP For more information on how to add new report template to the InLoox PM system, see Manage report templates.

Information rules in the document folder view

- 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 content.
- 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.

Information rules in the document list

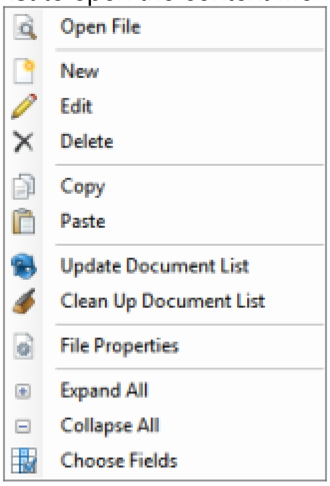
- An entry contains the following data: filename, size, type, state, note, created on, changed on, folder and path.
- If the element was added to the project using the button **Add to Project** the following is also included: Outlook sender, Outlook topic, Outlook received on.
  TIP For more information see Add Outlook elements to InLoox PM.
- 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.

Information rules in the preview area

- Choose a document from the document list in order to see it in the preview area. The preview area allows you to see the whole document with several pages.
- Use **Copy** and **Paste** features in the document, on the preview area.

Features in the context menu

- The context menu of the document list provides you with almost all basic features that are also available on the **Documents** page, on the Ribbon, such as **Open File**, **New**, **Edit**, **Delete**, **Update Document List**, **Clean Up Document List**, **File Properties**, **Copy** and **Paste.** It has also such features as **Expand** and **Collapse All Groups**, **Choose Fields**. Right-click in the document list to open the context menu.



Keyboard shortcut

- **CTRG+C** Copy a document into the clipboard.
- **CTRG+V** Paste a document from the clipboard to the document list.

NOTE You have no read permissions, if the lock icon is displayed in the list. In this case no item will be displayed.

Create and change the document folder path

InLoox PM organizes your file or SharePoint Server. Every project offers access to related documents.

With a click of a button you can quickly link the saved documents in you folder to the project by adding or changing a document folder path. This feature is also very useful, if you want to link a lot of new documents. All you need is just update your document page.

Article content

Create the document folder path

InLoox PM organizes your file or SharePoint Server. Every project offers access to related documents.

With a click of a button you can quickly link the saved documents in you folder to the project by adding or changing a document folder path. This feature is also very useful, if you want to link a lot of new documents. All you need is just update your document page.

1. Open an existing project or create a new one.

   TIP For more information on how to create a project see Create a project.

2. In the project, on the **Start** tab, in the **Section** group, click **Documents**.
3. On the **Edit** tab, in the **Document Path** group, click **Folder**.
   The added document path is now dislayed in the **Document Path** box.
   NOTE Click , in the **Document Path** group, to delete the document folder path.
4. In the **Select Document Store** dialog box do the following:

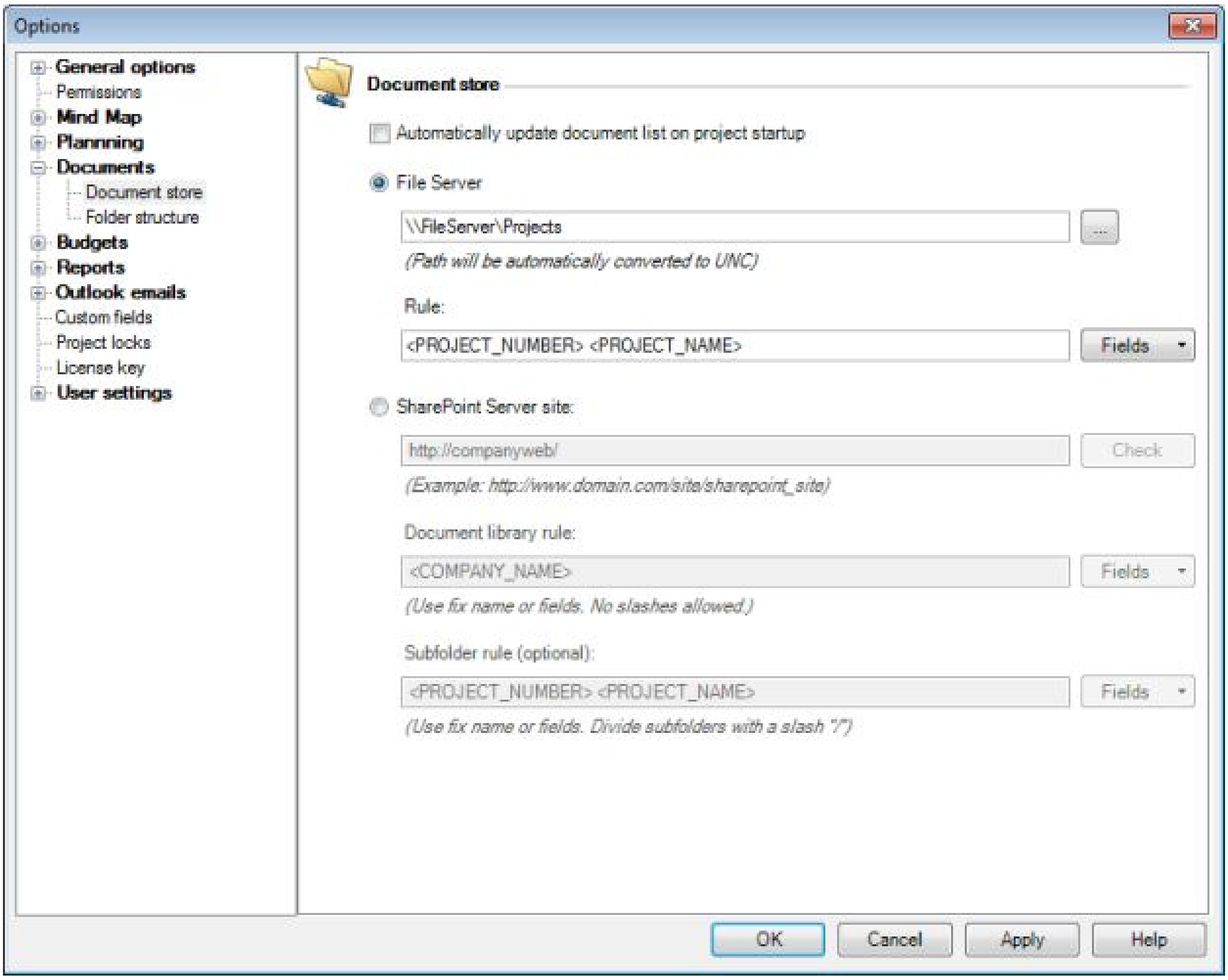
   

   1. In the **Type** area choose between **File server** / **Local computer** and **SharePoint store**.
   2. In the **Location** area click .
      Choose the folder you want to be read in.
5. On the **Documents** page, in the **Documents** group, click **Update Document List** .
   The folder content will be read in the document section of the project. You can start to work with it right away.
   TIP In the Documents area, on the left side the folder view will be displayed automatically. For more information see Create a subfolder.

Change the document folder path

The option page **documents** defines the rules for the InLoox PM file archiving feature. Some customizing options are available. The format of the project number affects the Document page. It is possible to update the contents of the project folder automatically.

1. Open the dialog box **InLoox PM Options**.
   TIP For more information, where you can find the InLoox PM options, see Open the InLoox PM options.
2. Under **Documents** click **Document store**. On the right side you will see the **Document store** area.



3. Do one of the following:
   - Select the **Automatically update document list on project startup** control box. 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 shows current information.
   - Select **File Server** and click ... to add the folder you want.
   - Define the rule in the **Rule** field by adding one of the following fields from the **Field** drop-down list:
     - <PROJECT_NAME> (Project name)
     - <PROJECT_NUMBER> (Project number)
     - <COMPANY_NAME> (Customer name of the project)
     - <CURRENT_YEAR> (Current year, four digits)
     - <DIVISION> (Division name)

     NOTE The **Standard parameter** <COMPANY_NAME>\<PROJECT_NUMBER> <PROJECT_NAME> points automatically to the following folder structure:
     <BASEPATH>\Customer1\2011-001 Project 1
     <BASEPATH>\Customer1\2011-002 Project 2
     <BASEPATH>\Customer2\2011-003 Project 1

   - Select **SharePoint Server site**:
     - **Base path**: Path to a SharePoint server site, e.g. http://companyweb/ or http://www.my-sharepoint.com/site_int/.

- **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.
- **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.

WARNING Effects of changing storage type, base path or rules:

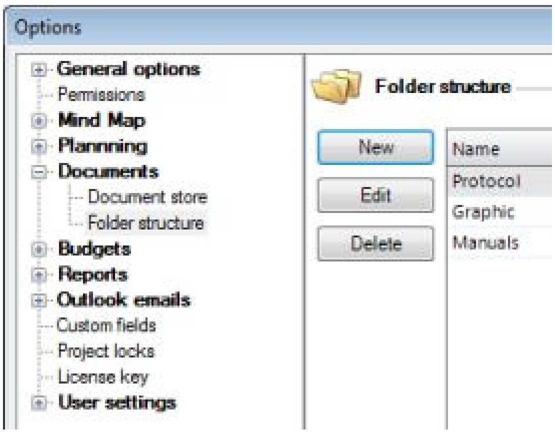
- If no projects are yet on file, changing these parameters has no effect.
- New projects or projects for which no document folders exist are managed automatically according to the changed parameters.
- Existing projects are managed with the existing document folder until the user changes this manually.

Create a subfolder

In the InLoox PM options you can define, which subfolder will be displayed on the Documents page by using file storage feature. InLoox PM allows subfolders to be created automatically in each document folder of a project.

TIP These subfolders are created new as soon as a user selects a new project folder on the Documents page. As many subfolders as required may be created automatically in a hierarchy structure of any depth. For more information see Create and change the document folder path.

1. Open the dialog box **InLoox PM Options**.
   TIP For more information, where you can find the InLoox PM options, see Open the InLoox PM options.
2. Under **Documents** click **Folder structure**. On the right side you will see the **Folder structure** area.



3. Do one of the following:

- Insert a new subfolder by clicking **New**. In the **New Subfolder** dialog box type a new name, e.g. **Marketing**. Click **OK**.
  InLoox PM creates in each project document folder a subfolder named marketing.
- Change the name of the existing subfolder. Choose one of them from the list and click **Edit**. Change the chosen item in the **Edit Subfolder** dialog box.
- Remove a subfolder from InLoox PM by clicking **Delete**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

TIP You can also create a subfolder directly in the project, on the **Documents** page. For more information see Work with the document list.

WARNING 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.

Create and edit a document

InLoox PM saves storage space and avoids duplicate records simultaneously. As the software works with file and object links, documents are not saved in Microsoft Outlook and Exchange Server.

The InLoox PM 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:

- Virtually no additional storage space required, keeping InLoox PM projects lean.
- File rights are inherited. If for example you add a file from a protected network folder or SharePoint store to the InLoox PM storage, the file can still only be read and updated by authorized users - at no additional cost.
- Backup and existing version and document management applications can still be used.

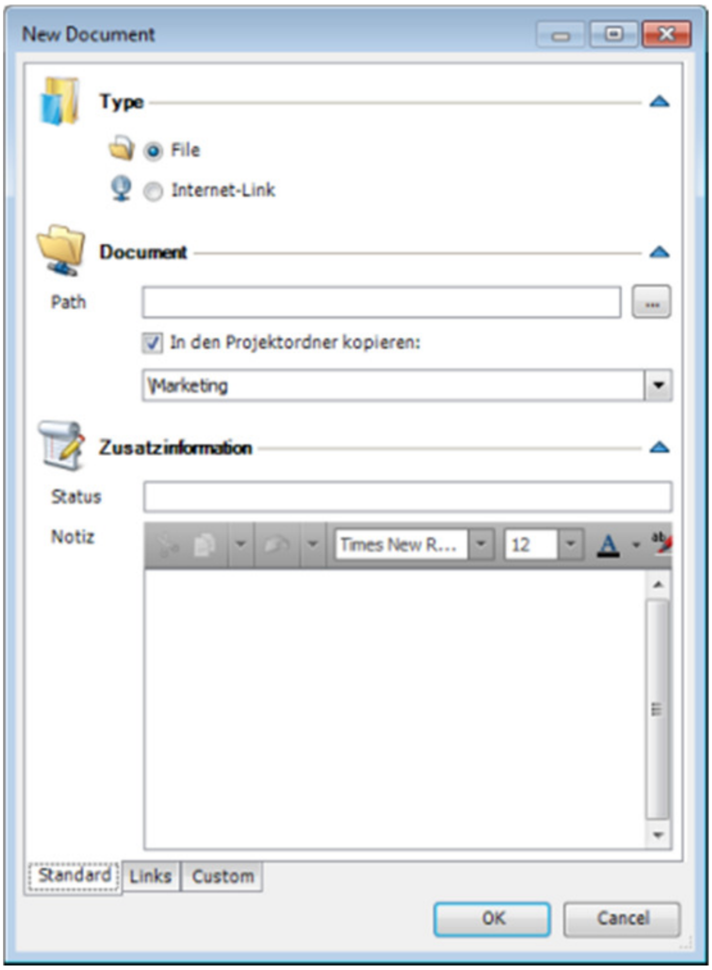
1. Open an existing project or create a new one.

   TIP For more information on how to create a project see Create a project.

2. In the project, on the **Start** tab, in the **Section** group, click **Documents**.a

   TIP Choose first the document folder path in the new project to store the new documents. For more information see Create and change the document folder path.

3. On the **Edit** page, in the **Edit**, click **New**.
   Or click **Edit** to edit the document.
4. In the **New Document** / **Edit Document** do the following:



- **General information to the document on the Standard tab**
  1. In the **Type** area select **File** or **Internet link**.
  2. On the **Document** area, in the **Path** box enter a path or internet link.

     By choosing **File** click ... and choose a document you want from the **Open** dialog box.
     The document will then be displayed in the **Document** list on the **Documents** page.
  3. Select the **Copy to project folder** check box. In the drop-down list choose a subfolder, in which you want to copy the document.

     TIP For more information on how to create a subfolder, see Create a subfolder.

  4. In the **Additional information** area, in the **Status** field enter instructions, e.g. complete or awaiting release.
  5. In the **Notes** field enter comments and remarks to the document.
     TIP InLoox PM provides you with the range of the formatting features. For the detailed description see Create and change comments in the Customize comments section.
- **Links to other project items on the Links tab**
  1. Create links:
     1. Click **Add**.
     2. Choose between **Planning**, **Time Tracking** or **Mind Map** items from the **Assign Document/Object Link** box.

3. Click **Add** and then **OK**.
   InLoox PM displays a document as a paper clip on the page you have chosen. You can also open the document on this page.
2. You can open the chosen page. Select one from the list on the **Links** tab in the **Documents** area and click **Open**.
3. If you want to delete the item from the list in the **Documents** area, click **Remove**.

- **Further information to the document on the Custom tab**
  - Click in the previously created custom box and enter a new value for it.

  TIP For more information on how to add a new custom field in InLoox PM, see Create custom fields.

5. Click **OK** to save the changes.

TIPS

- Add the document via Drag and Drop.
- You can also add the documents from Outlook to the InLoox PM planning via this function. For more information see Add Outlook elements to InLoox PM.

Cleaning the document list

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

1. Open a project with the saved documents on the **Documents** page.

   TIP For more information on how to save a document, see Create and edit a document.

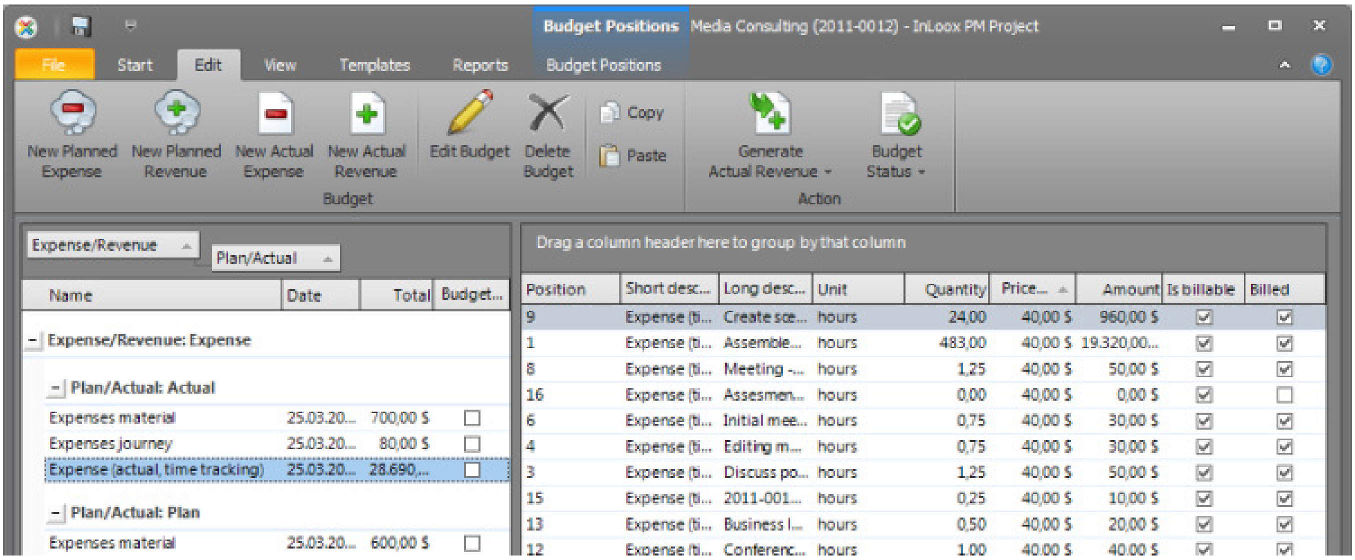
2. In the project, on the **Start** tab, in the **Section** group, click **Documents**.
3. From the **Folder structure** list choose the subfolder or **All Documents**.
   TIP For more information on how to create a subfolder, see Create a subfolder.
4. On the **Edit** tab, in the **Documents** group click **Clean Up Document List**.
   You can also use the context menu as an alternative. Choose from this menu **Clean Up Document List**. Right-click on one of the projects in the project list to open the context menu.
5. In the **InLoox PM** dialog box click **Yes**, to remove the entries from the **Clean Up Document List** area from the database.

WARNING Information can be lost during cleaning.

Budgets

Work with the budget list

In the project, in the **Start** tab, in the **Section** group, click **Budgets**  to open the **Budgets** page. On this page, in the **Edit** tab you will find the following features of the budget list:



- **Expense (actual, time tracking)** InLoox PM creates automatically an **Expense (actual, time tracking)**. The time tracking items in this budget are disposed according to the activities and groups, to which they belongs.
  NOTE The Editing of the expense (actual, time tracking) is limited.

- **Expenses (planned, resources)** InLoox PM creates automatically an **Expenses (planned, resources)**. The total work time of all resources is multiplied by the group purchasing price for each activity. All activity expenses are cumulated by group.

  TIP Each group has an internal price per hour. You can change this price/group or add a new one via the InLoox PM options. For more information see Generate and edit groups.

- **Create a planned expense** On the **Edit** tab, in the **Budget** group click **New Planned Expense** to record expenses. The resources will be used from the planning.

  TIP For more information about adding of budgets, see Create and edit a budget.

- **Create a planned revenue** On the **Edit** tab, in the **Budget** group click **New Planned Revenue**. A planned revenue serves a planning or proposal preparation.
  TIP For more information about adding of budgets, see Create and edit a budget.

- **Create an actual expense** On the **Edit** tab, in the **Budget** group click **New Actual Expense** to record actual expenses.

  TIP For more information about adding of budgets, see Create and edit a budget.
- **Create an actual revenue** On the **Edit** tab, in the **Budget** group click **New Actual Expense**. An actual expense can be also generated, e.g. with the expense positions from the time tracking. Normally an actual expense is a bill.

  TIP For more information about billing, see Generate an invoice.
- **Edit a budget** Choose a budget from the budget list, which you want to edit. On the **Edit** tab, in the **Budget** group click **Edit Budget**.

  TIP For more information about editing of budgets, see Create and edit a budget.
- **Delete a budget** Choose a budget from the budget list, which you want to remove. On the **Edit** tab, in the **Budget** group click **Delete Budget**.
- **Copy and paste** Create quickly budgets with the help of **Copy** and **Paste** feature on the **Edit** tab, in the **Budget** group.
- **Change a budget status** Choose a budget from the budget list. On the **Edit** tab, in the **Budget** group click **Budget Status**. On the drop-down list click status you want to have.
- **Print a budget list** On the **View** tab, in the **Common** group click **Print** to start the quick print feature of the budget list. Choose **Budgets** in the drop-down list.

  TIP For more information about printing, see General features and print of the project list, in the **Print in the project list**.
- **Expand or reduce the budget view** Change the view with the help of **Expand All** or **Collapse All o**n the **View** tab, in the **Common** group to make clear the budget view.
- **Choose Fields** This feature sorts and organizes the project by important data.
  - On the **View** tab, in the **Common** group click **Choose Fields**. On the dialog box click one field, e.g. **Type**, and drag it into the column headers.
  - Reset the fields per Drag and Drop into the dialog box.

Information rules in the budget list

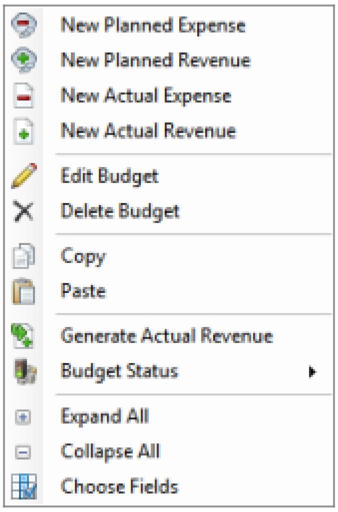
- An entry contains the following data: type (planned expenses, planned revenues, actual expenses, actual revenues),sequence number, date, status, name, amount, budget neutral, created by, created on, changed by, changed by.
- Each entry has a **unique number**.
- Each entry has a **status**, which is freely definable.

  TIP For more information about the budget status, see Manage the budget status.
- The **total amount** of all positions included in the budget is displayed.

  TIP For more information about the budget position, see Working with the budget position list and Create and edit a position.
- The list is sorted by **date** in descending order. You can group or sort it as an Outlook list

Features in the context menu

The context menu provides you with almost all basic features that are also on the InLoox PM Ribbon, such as **New Planned Expense**, **New Planned Revenue**, **New Actual Expense**, **New Actual Revenue**, **Edit Budget**, **Delete Budget**, **Generate Actual Revenue**, **Copy** and **Paste**, **Choose Fields**. It has also such features as **Expand** and **Collapse All Groups**, **Status**, where you can define whether the budget is **Approved**, **Rejected** or **Open**. Right-click in the budget list to open the context menu.



Keyboard shortcut

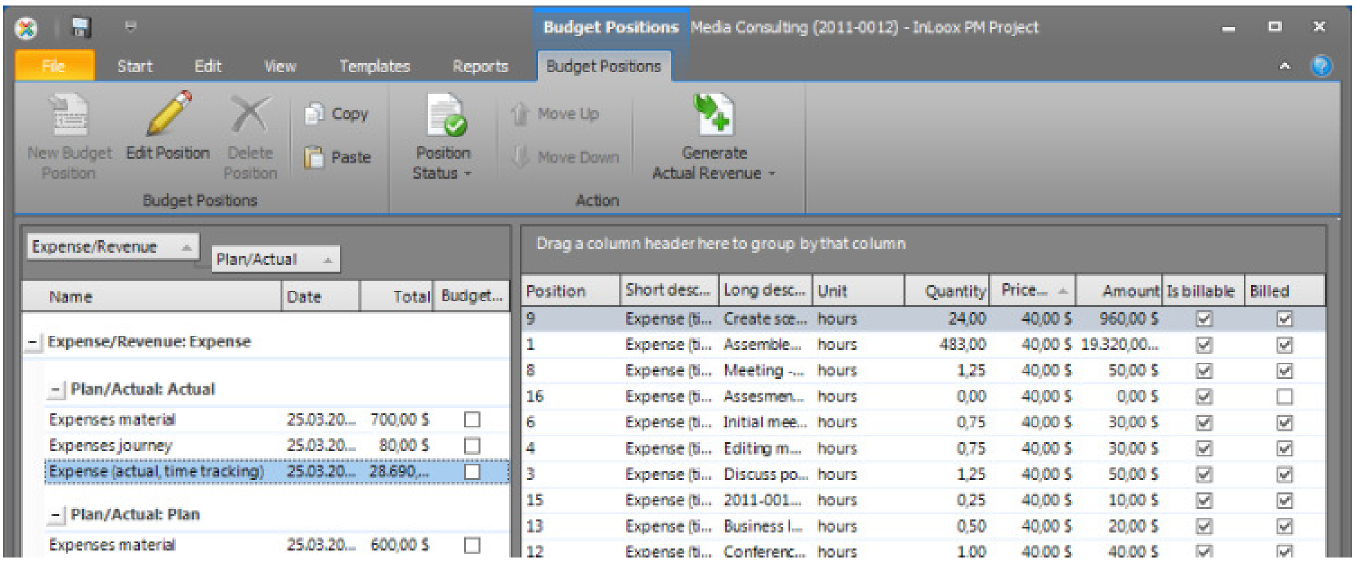
- **CTRG+C** Copy a budget into the clipboard.
- **CTRG+V** Paste a budget from the clipboard to the budget list.

NOTE You have no read permissions, if the lock icon is displayed in the list. In this case no item will be displayed.

Work with the budget positions list

In the project, in the **Start** tab, in the **Section** group, click **Budgets** 

to open the **Budgets** page. On this page, in the **Edit** tab you will find the following features of the budget positions list:



- **Create a budget position** Choose one budget from the budget list. On the **Edit** tab in the **Budget Positions** group click **New Budget Position**. Alternatively double-click on the empty field in the budget positions list.

  TIP For more information about creating of budget positions, see Create and edit a budget position.

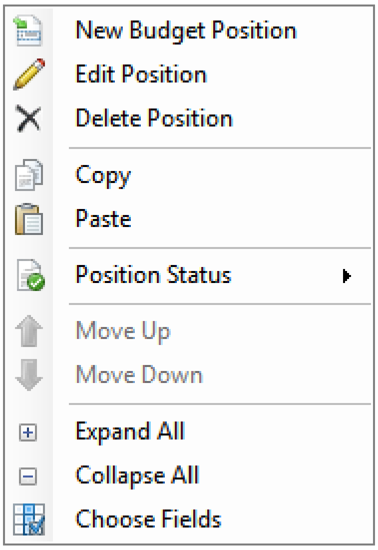
- **Edit a budget position** Choose one budget position from the budget positions list. On the **Edit** tab in the **Budget Positions** group click **Edit Position**. Alternatively double-click on an item in the budget positions list.
  TIP For more information about editing of budget positions, see Create and edit a budget position.
- **Delete a budget position** Choose one budget position from the budget positions list. On the **Edit** tab in the **Budget Positions** group click **Delete Position**. Alternatively press DELETE key.
- **Copy and paste** Create quickly budget positions with the help of **Copy** and **Paste** feature on the **Edit** tab in the **Budget Positions** group.
- **Change a budget position status** Choose one budget position from the budget positions list. On the **Edit** tab in the **Budget Positions** group click **Position Status**. On the drop-down list click the wanted status.
- **Move a position upward** Choose one budget position from the budget positions list and click **Move Up** in the **Budget Positions** group.
- **Move a position downward** Choose one budget position from the budget positions list and click **Move Down** in the **Budget Positions** group.
- **Print a budget positions list** On the **View** tab in the **Common** group click **Print** in the **Common** group to start the quick print feature of the budget positions list. Choose **Budget positions** in the drop-down list.
  TIP For more information about printing, see General features and print of the project list, in the **Print in the project list**.
- **Load budget positions as a template** On the **Templates** tab in the **Action** group click **Load Template**.
  TIP For more information on how to save a budget positions as a template, see Load a budget template.
- **Save budget positions as a template** On the **Templates** tab in the **Action** group click **Save Template**.
  TIP For more information on how to save a budget positions as a template, see Save a budget template.

Information rules in the budget positions list

- 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 the budget types planned expenses and actual expenses), is billable, position in the list, created by, created on, changed by, changed on, provision date (for actual expenses(time tracking) only, this is the start date of the time tracking item)
- Each entry has a unique number.
- The total amount of all entries is then displayed, when the list is grouped by according column. Drag a column header you want into the area above the budget positions list.

Features in the context menu

The context menu provides you with almost all basic features that are also on the InLoox PM Ribbon, such as **New Budget Position**, **Edit Position**, **Delete Position**, **Generate Actual Revenue**, **Copy** and **Paste**, **Expand** and **Collapse All Groups**, **Move Up** and **Down.** It has also such feature as **Status**, where you can define whether the budget is **Not billed**, **Billed** or **Note billable**. Right-click in the budget positions list to open the context menu.



- **Choose Fields** This feature sorts and organizes the project by important data.
    - On the **Choose Fields** dialog box click one field, e.g. **Group**, and drag it into the column headers.
    - Reset the fields per Drag and Drop into the dialog box.

Keyboard shortcut

- **CTRG+C** Copy a budget position into the clipboard.
- **CTRG+V** Paste a budget position from the clipboard to the budget position list.

NOTE You have no read permissions, if the lock icon is displayed in the list. In this case no item will be displayed.

Create and edit a budget

InLoox PM clearly defines project budget by planned and actual expenses and revenues in minimum time. InLoox PM provides following budget types as plan revenues, plan expenses, actual revenues and actual expenses. A budget has a status and usually contains positions.

TIP Find out more about budget types in the Work with the budget list. For more information about budget positions, see Create and edit a budget position.

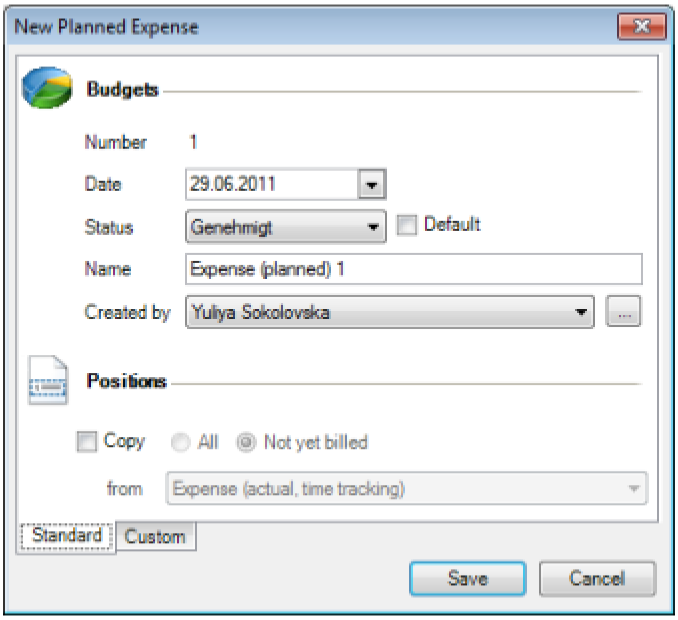
If you want to add a budget document, do the following:

1. Open an existing project or create a new one.

   TIP For more information on how to create a project, see Create a project.

2. In the project, on the **Start** tab, in the **Section** group, click **Budgets**.
3. On the **Edit** tab, in the **Budgets** group click **New Planned Expense**, **New Planned Revenue**, **New Actual Expense** or **New Actual Revenue**, depending on which budget type you want to create**.**

4. In the dialog box **New Budget** / **Edit Budget** do the following:



- **General information to the budget on the Standard tab**
  - A unique budget number is formed from the **type** and a **sequence number**. The number cannot be changed and is not re-issued after the budget is deleted
  - Enter a name in the **Name** field. InLoox PM affords such budget types as **planned expense**, **planned revenue**, **actual expense** and **actual revenue.**

    NOTE Use a unique name to make it easier for you and your customer to assign a budget from outside of InLoox PM.

  - In this area define the budget status. Choose **Approved**, **Rejected** or **Open** in the **Status** drop-down list.

    TIP Use **Open** for example for not yet ordered offers or unpaid invoices. You can customize a status. For more information see Manage the budget status.

  - In the **Budget** area, in the **Date** field, choose a date. The actual date is set automatically, when creating a new budget.
  - In the **Created by** area click ... to add a person's name, who creates this budget document.

    NOTE Use **quick selection** to add a new resource. Click **Arrow**. You can see in the drop-down list all resources, which have been added to the project.
- **Further information to the budget on the Custom tab**
  - Click in the previously created custom box and enter a new value for it.

    TIP For more information on how to add a new custom field in InLoox PM, see Create a custom field.

TIP You can also copy positions from the other already existing budgets to the new one. Use commands **Copy** and **Paste** from the **Budget Positions** tab, in the **Budget Positions** group. Use also CTRG+C and CTRG+V buttons.

For more information see Create and edit a budget position in the Copy positions from the existing budget documents section.

Create and edit a budget position

Each budget contains one or more positions. The level of detail that your budget is broken down into is completely up to you.

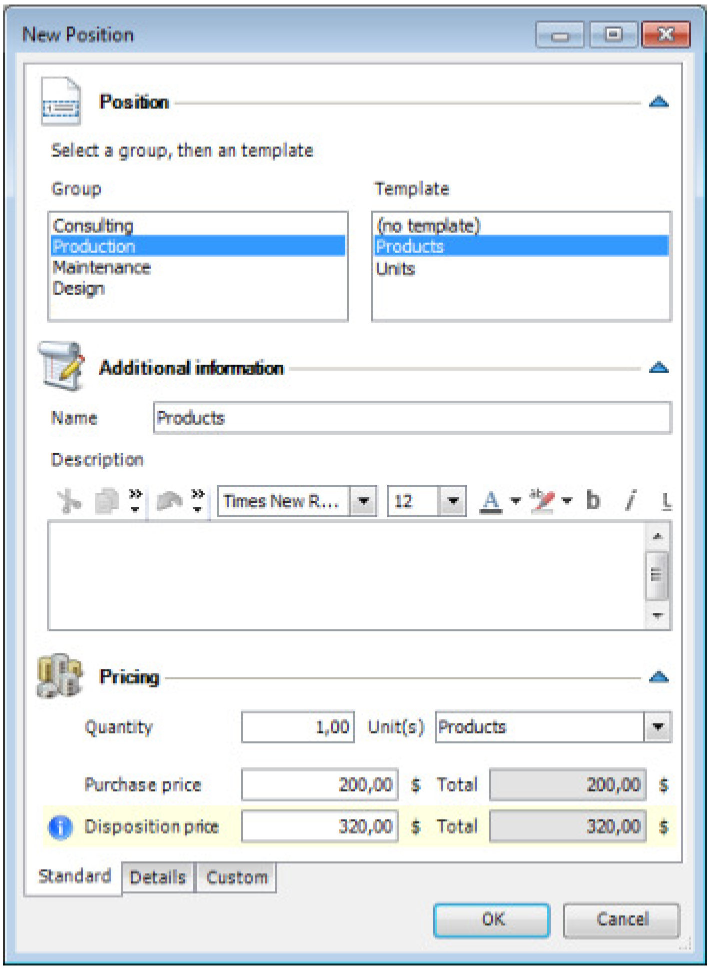
Article content

Create a budget position in the budget position list

1. Open a project with the existing budget.

   TIP For more information on how to create a budget, see Create and edit a budget.

2. In the project, in the **Start** tab, in the **Section** group, click **Budgets**.
3. On the **Budgets** page choose a budget from the budget list, to which you want to add a position. Click **New Budget Position** or **Edit Position**.
4. In the **New Position** / **Edit Position** do the following:



- **General information to the budget position on the Standard tab**
  1. Select one group from the **Group** list to which the position belongs. The group defines the structuring of position within the system.

     TIP The groups can be customized under InLoox PM options. For more information see Generate and edit groups.

  2. Select the position you want from the **Template** list.

     TIP For more information on how to create budget positions for template, see Manage budget positions for templates.

  3. In the **Name** field type a name to change the short position name.
  4. In the **Description** area you can add the important information on this position.
     TIP InLoox PM provides you with the range of the formatting features. For the detailed description see Create and change comments in the Customize comments section.
  5. On the **Pricing** area do the following:

     TIP In the **Pricing** area all the fields are filled out automatically, if you have chosen the position with the already added price model. For more information on how to set up the standard pricings model, see Manage budget positions for templates.

1. In the **Quantity** field enter the quantity of the selected item, e.g. 95 or 2.34. You can also issue a credit items by entering a negative amounts.
2. In the **Unit(s)** enter a value. The selected **unit** is linked to the according **price per unit**. Select a unit, if there is more than one, or change the unit price manually.

   NOTE All prices are without VAT because InLoox records only net earned premiums.

3. Enter **Purchase** and **Disposition price**.
4. In the **Total** field you can see now the position amount ("Price per unit multiplied by quantity").

- **More information to the budget position on the Details tab**
  1. In the **Performed by** field click … to add a person's name, who creates this budget position document.
     NOTE Use **quick selection** to add a new resource. Click **Arrow**. You can see in the drop-down list all resources, which have been added to the project.
  2. In the **Provision date** choose a date for the provision services or delivery date.

     NOTE This date is set automatically as a start date by actual expenses (time tracking) for the time tracking item.

  3. Select the **Billed** control box.

     NOTE Only for the position of the budget types actual expensesor planned expenses. This is set automatically once the position (or the entire document) has been billed.

  4. Select the **Billable** control box.

     NOTE Only for the positions of the budget types actual expensesor planned expenses. The positions with this status are not included in the actual revenues.

- **Further information to the budget position on the Custom tab**
  - Click in the previously created custom box and enter a new value for it.

    TIP For more information on how to add a new custom field in the InLoox PM system see Create custom fields.

5. Click **OK** to save the changes.

TIP An internal price per hour is in file for each group. The internal prices and the available groups can be customized under Generate and edit groups.

Copy positions from the existing budget documents

Copy positions to be more efficient instead of adding them, if a project contains already budget information.

- Copy one single position via the commands **Copy** and **Paste** from a budget of one project to another budget (optionally of the other project) within a project. Cross-project copying enables you to reuse positions which have already been created somewhere else. These commands are available on the **Budget Positions** tab, in the **Budget Positions** group.
- Copy all position of one budget type with the help of the commands **Copy** and **Paste** on the **Edit** tab, in the **Budget** group.
- Copy position from one project to another via the **Windows clipboard**.

Manage the budget status

You can add a status to each budget document. There are three statuses such as open, approved and rejected in the InLoox PM by default.

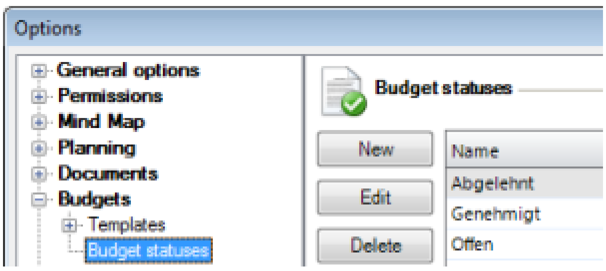
TIP For more information about budget status, see <u>Create and edit a budget</u>.

In the InLoox PM options you can change the budget statuses and add a new one.

1. Open the dialog box **InLoox PM Options**.

   TIP For more information, where you can find the InLoox PM options, see <u>Open the InLoox PM options</u>.

2. Under **Budgets** click **Budget statuses**. On the right side you will see the **Budget statuses** area:



3. Do one of the following:
   - Add a new budget status by clicking **New**. In the **Budget Status** dialog box, in the **New name** filed type a new name. Select the **Budget neutral** control box, if you don't want to include the budget to the totals in the budget overview.
   - Edit the already existing status in the **Budget Statuses** list. Choose one from the list and click **Edit**. In the **Budget Statuses** dialog box you can make you changes (see the first point)
   - Remove the status from InLoox PM by clicking **Delete**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

WARNING Effects of editing or deleting a budget status:

- The renaming of a status takes immediate effect in all relevant projects.
- On the deletion of a status the relevant budgets have no status until a user selects a new one in the project, on the budget page over the New Budget / Edit budget dialog box.

Generate an invoice

InLoox PM enables to create, send, and follow up project-oriented offers and invoices. Also, ongoing Billing is possible based on project time tracking. Automatic billing numeration avoids forgetting any expenses or charging them twice.

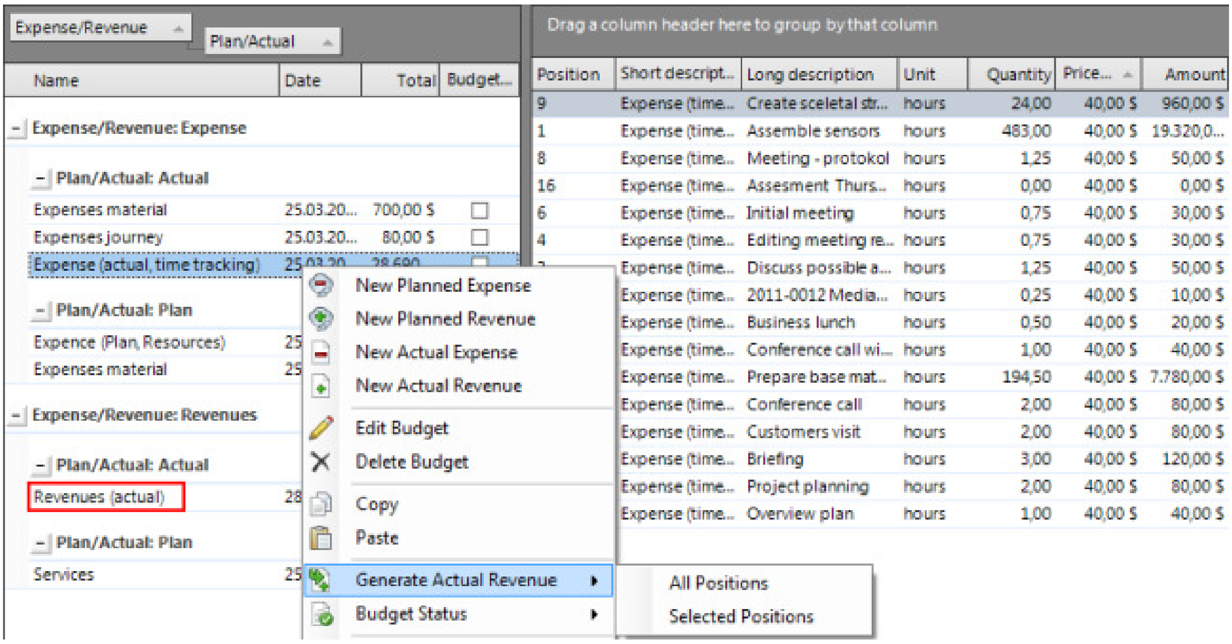
Article content

Generate an invoice

1. Open an existing project with the budget.

   TIP For more information on how to create a budget, see Create and edit a budget.

2. In the project, on the **Start** tab, in the **Section** group, click **Budgets**.
3. Choose a budget from the budget list, to which you want to generate a bill (actual revenue).
4. On the **Edit** tab, in the **Action** group click **Generate Actual Revenue**.
   Alternativly you can generate a bill from the context menu via **Generate Acutal Revenue**. Right-click in the budget list to open the context menu and choose **Generate Actual Revenue**
5. Choose from the drop-down list between **All Positions** and **Selected Positions**.
6. The actual revenue is generated together with the positions of the budget document you have chosen.



Issue a report for the budget

Issue a report to each budget document and send it as a document via email.

1. On the **Budget** page, in the budget list, choose a budget, to which you want to issue a report.
2. Click the **Reports** tab.
3. Do one of the following:
    - In the **Create Reports** group click **Create Report**, in the **New Report** dialog box, in the **Report** tab choose a template from the **Use this template** drop-down list. Filter the data you wish in the **Budgets** tab and then click **Create**.

      TIP For more information on how to issue a report and adjust the data, see Create a report.

    - In the **Reports** group choose a report you want from the gallery view, e.g. **Offer**. In the **Print Options** dialog box choose the output format, e.g. Excel, PDF or Word document. Click **Start**.
      Such report templates as **Expenses** / **Revenues**, **Budget overview** or **Transaction list** are included into the standard delivery.

      TIP For more information on how to add new budget template to the InLoox PM system, see Manage report templates.

Manage budget documents for templates

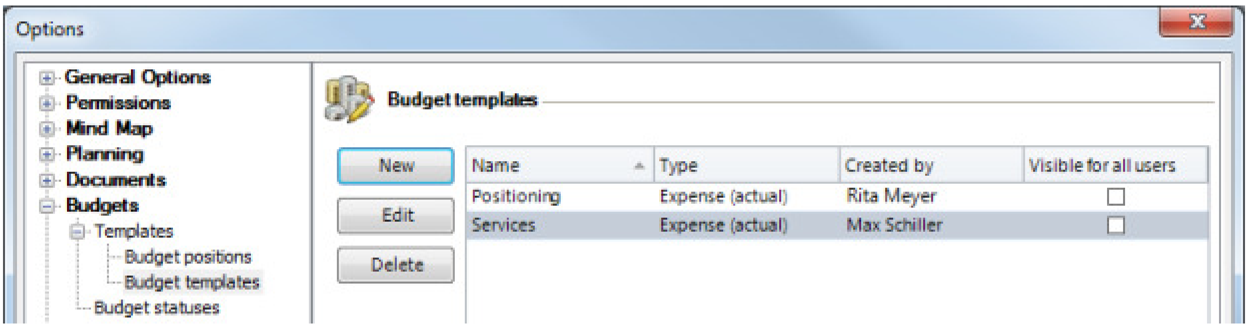
Add, change or delete the budget documents in the InLoox PM options. The recurring budget positions can be added to this budget documents.

IMPORTANT To manage the templates you need the InLoox PM administrator permissions.

1. Open the dialog box **InLoox PM Options**.

   TIP For more information, where you can find the InLoox PM options, see Open the InLoox PM options.

2. Under **Budgets** click **Templates** and then **Budget templates**. On the right side you will see the **Budget documents** area:



3. Do one of the following:

- Add a new budget document template by clicking **New**.
  - In the **New Budget Document Template** dialog box choose a budget type in the **Type** drop-down list.
  - Select the **Visible for all users** control box, if you want to have this option.
  - Type a new name in the **Name** field.
  - You can add a position by clicking **New**. Change the budget positions list by clicking **Edit**, **Delete**, **Up** or **Down**. Click **OK** after you made all changes you wanted.

    TIP For the detailed description about the features in the New Budget Position / Edit Budget Position dialog box, see Create and edit a budget position.

- Edit the already existing budget document template in the **Budget documents** list. Choose one from the list and click **Edit**. In the **Edit Budget Document Template** dialog box you can make changes you want (see the first point).
- Remove the budget document template from InLoox PM by clicking **Delete**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

NOTES

- The name of each budget document template should be short and unambiguous.
- The description in the **Name** field can include wildcard characters, e.g. ...size is x units...

Manage budget positions for templates

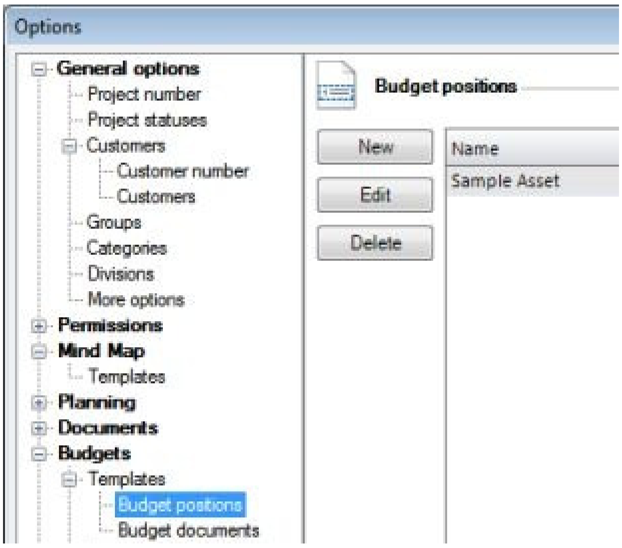
The budget documents contain the budget positions which can be called up by the users in all InLoox PM projects on the budget page. The budget positions can be edited or deleted in the InLoox PM options as required.

IMPORTANT To manage the templates you need the InLoox PM administrator permissions.

1. Open the dialog box **InLoox PM Options**.

   TIP For more information, where you can find the InLoox options, see Open the InLoox PM options.

2. Under **Budgets** click **Templates** and then **Budget positions**. On the right side you will see the **Budget positions** area:



3. Do one of the following:
   - Add a new budget position by clicking **New**.
     - In the **New Position** dialog box type a new name in the **Name** field. Type additional information in the **Description** field.
     - Enter the number you want in the **Quantity** field.
     - In the **Pricing** list click **New** to add a new position. In the **New Unit** dialog box enter a **Name**, **Purchase price** and **Disposition price** and click **OK**.
     - Choose a group in the **Group(s)** list.
       The created pricing model will be loaded, if you select this position in the **New Budget Position** / **Edit Budget Position** dialog box in the project.

       TIP For the detailed description on how to create a budget position see Create and edit a budget position.

     - Change the budget positions list by clicking **Edit**, **Delete**, **Up** or **Down**. Click **OK** after you made all changes you wanted.
     - Click **OK**.
   - Edit the already existing budget position in the **Budget positions** list. Choose one from the list and click **Edit**. In the **Edit Position** dialog box you can make changes you want (see the first point).
   - Remove the budget position from InLoox PM by clicking **Delete**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

NOTES

- The name of each budget position should be short and unambiguous.
- The description in the **Description** field can include wildcard characters, e.g. ...size is x units...

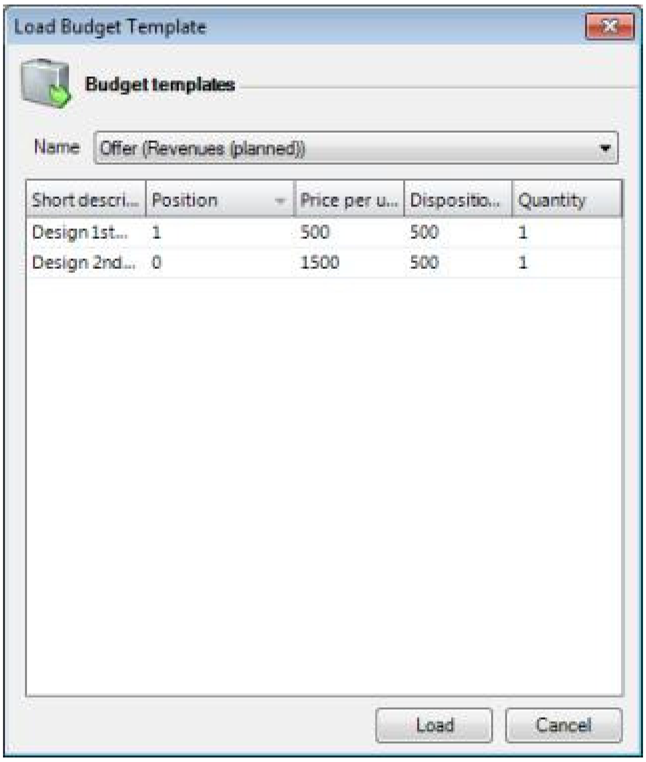
Load a budget template

Define recurring budgets. The templates allow you to load complete offers, invoices or project estimates in one simple step.

1. Open the project with the existing budget.

TIP For more information on how to create a budget, see Create and edit a budget.

2. In the project, in the **Start** tab, in the **Section** group, click **Budgets**.
3. On the **Budgets** page, in the budget list, choose a budget.
4. On the **Template** tab, in the **Action** group click **Load Template**.



In the **Load Budget Template** dialog box the included position of the templates are displayed.

5. In the **Name** drop-down list choose a name of the template.
6. Click **Load**.

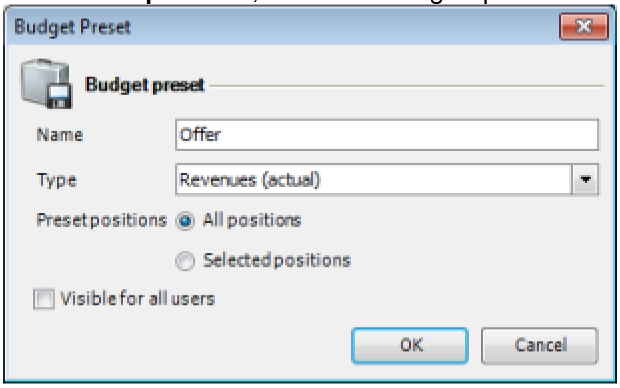
Save a budget template

1. Open the project with the existing budget.

TIP For more information on how to create a budget, see Create and edit a budget.

2. In the project, in the **Start** tab, in the **Section** group, click **Budgets**.
3. On the **Budgets** page, in the budget list, choose a budget.

4. On the **Template** tab, in the **Action** group click **Save Template**.



5. Type a new name in the **Name** field.
6. Choose a budget type in the **Type** drop-down list.
7. Choose whether you want to have in your template all positions or only selected.
8. Select **Visible for all users** control box, if you wish.
9. Click **OK**.
   The new template is now available under Load Template. For more information see Load a budget template.

Budget overview

Display the budget overview

Compare planned and actual time and expense values on a real-time basis. View single activities, resources or even entire projects – you won't lose deviations of your project anymore.

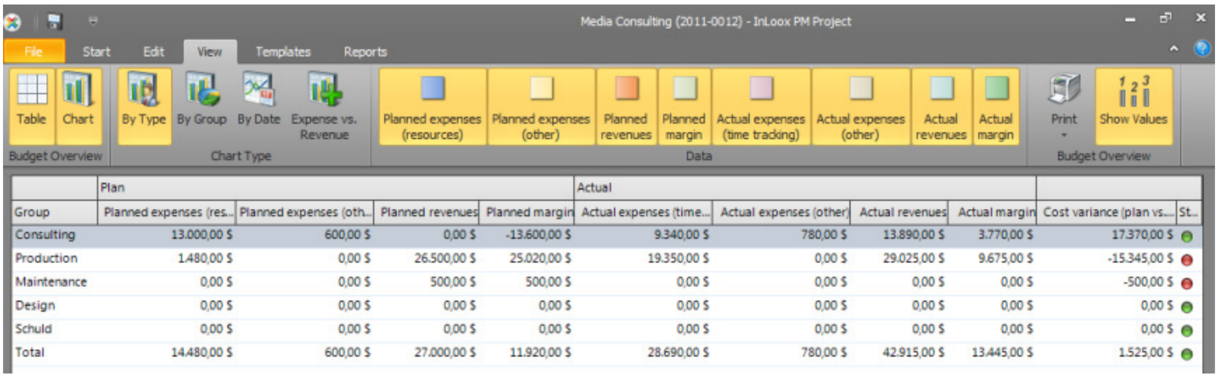
Article content

Tabular overview

1. Open a project with the existing budget.

   TIP For more information on how to create a budget, see Create and edit a budget.

2. In the project, on the **Start** tab, in the **Section** group, click **Budget Overview**.
3. On the **View** tab, in the **Budget Overview** group click **Table**.



	Plan				Actual					
Group	Planned expenses (res...	Planned expenses (oth...	Planned revenues	Planned margin	Actual expenses (time...	Actual expenses (other)	Actual revenues	Actual margin	Cost variance (plan vs....	St...
Consulting	13.000,00 $	600,00 $	0,00 $	-13.600,00 $	9.340,00 $	780,00 $	13.890,00 $	3.770,00 $	17.370,00 $	
Production	1.480,00 $	0,00 $	26.500,00 $	25.020,00 $	19.350,00 $	0,00 $	29.025,00 $	9.675,00 $	-15.345,00 $	
Maintenance	0,00 $	0,00 $	500,00 $	500,00 $	0,00 $	0,00 $	0,00 $	0,00 $	-500,00 $	
Design	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	
Schuld	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	0,00 $	
Total	14.480,00 $	600,00 $	27.000,00 $	11.920,00 $	28.690,00 $	780,00 $	42.915,00 $	13.445,00 $	1.525,00 $	

In the table you will see the figures cumulated by **Group**.

TIP For more information about groups, see What do the fields and chart types of the budget overview mean?

Control budgets

- Check the totals under the columns **Actual expenses (time tracking)**, **Actual expenses (other)**, **Actual revenues** and **Actual margin**.
- Budget overruns are highlighted in color, making it easy to identify unplanned additional expenses.
  If the line is marked in red, the negative result is expected.
- Use the views to control more projects simultaneously.
  1. Click **Projects** on the **Outlook Ribbon** to switch to the InLoox PM project list.

     NOTE In Outlook 2003/2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

  2. In the **InLoox PM** tab, in the **View** group, click **More Views**.
  3. In the drop-down list choose the saved view, e.g. project controlling.
- As a alternative you can use also **Choose fields** for the project controlling.

TIP For more information see Generate personalized views.

Export the report to Microsoft Excel

1. Click **Reports** tab.
2. In the **Reports** group, in the gallery view click **Budget Overview**.
3. In the **Print Options** dialog box choose settings you want, e.g. Excel as an issue format.

TIP For more information on how issue a report, see Create a report.

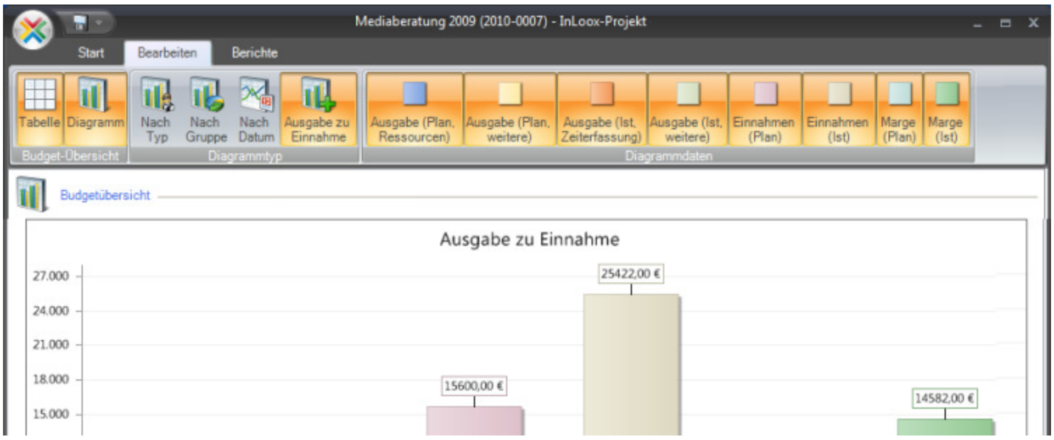
4. Click **Start**.
5. Choose whether you want print, save or send the document per email.

Graphical overview

1. Open a project with the existing budget.

TIP For more information on how to create a budget, see Create and edit a budget.

2. In the project, in the **Start** tab, in the **Section** group, click **Budget Overview**.
3. On the **Budget Overview** page, in the **Budget Overview** group click **Chart**.



4. You have the opportunity to view different budget chart types. In the **Chart Type** group choose the desired chart between **By Type**, **By Group**, **By Date** or **Expense vs. Revenue**)

TIP For more information about chart types, see What do the fields and chart types of the budget overview mean?

Control budgets

Create a graphical overview to control several projects. Do following steps:

1. Click **Projectlist** on the **Outlook Ribbon** to switch to the **InLoox PM project list overview**.

NOTE In Outlook 2003/2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. In the **InLoox tab**, in the **View** group, click **Dashboard**.
3. In the Dashboard view adjust your individual overview.

TIP For more information see the category Dashboard view.

What do the fields and chart types of the budget overview mean?

Compare planned and actual expenses and revenues with the help of the budget overiew. The graphic representation gives you an instant overview of your budget status.

Below you will find the detailed description of the table and chart types.

NOTES

- Click on the corresponding buttons in the chart data area to make series invisible or visible.
- In the **Budget Overview** group click on **Show Values** to display series labels and currencies.

Article content

Description of the tabular overview

The **overview** area gives an ongoing comparison between the amounts of the management, planning and budgets pages in the table. The list represents you all amounts cumulated by group:

Column	Description
Group	Each group has one row. NOTES • Amounts in the columns 2-10 are cumulated by group. • The row amount shows the totals from each column. • An internal price per hour is recorded for each group. TIP The internal prices per hour and the available groups can be customized under Create and edit groups. • If you insert an individual price per hour for the resources, the group costs will be ignored. TIP For more information about the individual price per hour for the resources, see Add resources.
Planned expenses (resources)	Expenses of all activities from the planning page Planning page. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing price for each activity. All activity expenses are cumulated by group. TIP For more information about the group purchasing price see Create and edit groups.

Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of planned expenses type are totalled and/or cumulated by group.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of planned revenues type are totalled and/or cumulated by group.
Planned margin	Variance between planned revenues and planned expenses (planned expenses (resources) and planned expenses (other)). Method: planned revenues column minus (planned expenses (resources) column plus planned expenses (other) column).
Actual expenses (time tracking)	Actula 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. TIP For more information about the group purchasing costs see Create and edit groups.
Actual expenses (other)	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of actual expenses type are totalled and/or cumulated by group.
Actual revenues	Actual revenues from the budget page. Method: Budget documents of actual revenues type are totalled and/or cumulated by group.
Actual margin	Difference between actual revenues and actual expenses (actual expenses (time tracking) and actual expenses). Method: actual revenues column minus (actual expenses (time tracking)column plus actual expenses column).
Cost variance (plan vs. actual)	Difference between actual margin and planned margi. Method: actual margin column minus planned margin column.
Status	A negative amount in the 10th column (debit/credit) is marked red. In this case the actual margin is lower than the planned margin. This can mean the following depending on the project focus: • expenses exceed revenues • revenues are lower as expected • Expenses are higher as expected.

It is possible to display the total costs, revenues, profit and cost overruns in the InLoox PM project list.

TIP For more information see Generate personalized views.

Chart type by type

The chart type By type gives an ongoing comparison between the amounts of the management, planning and budgets pages. The list represents you all amounts cumulated by group:

Element	Description
Planned expenses (resources)	Costs of all activities from the planning page. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing costs for each activity. All activity expenses are cumulated by group TIP For more information about the group purchasing costs see Create and edit groups.
Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of planned expenses type are totalled and/or cumulated by group.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of planned revenues type are totalled 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. TIP For more information about the group purchasing costs see Create and edit groups.
Actual expenses	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of actual expenses type are totalled and/or cumulated by group.
Actual revenues	Actual revenues from the budget page . Method: Budget documents of actual revenues type are totalled and/or cumulated by group.

Chart type by group

The chart type By group gives an ongoing comparison between the amounts management, planning and budgets pages. The list represents you all amounts cumulated by group:

Element	Description
All columns	Cumulated revenues (planned revenues, actual revenues) and expenses (planned expenses, actual expenses (time tracking), actual expenses) per InLoox PM used 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.

Chart by date

In the chart By date each row shows the cumulated revenues (planned revenues, actual revenues) and expenses (planned expenses, actual expenses (time tracking), actual expenses) of the project within a pre-defined time period:

Element	**Description**
Planned expenses (resources)	Costs of all activities from the planning page.. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing costs for each activity. All activity expenses are cumulated by record time TIP For more information about the group purchasing costs see Create and edit groups.
Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of planned expenses type are totalled and/or cumulated by record time.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of planned revenues type are totalled 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 TIP For more information about the group purchasing costs see Create and edit groups.
Actual expenses	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of actual expenses type are totalled and/or cumulated by record time.
Actual revenues	Actual revenues from the budget page. Method: Budget documents of actual revenues type are totalled and/or cumulated by record time.

Chart type expense vs. revenues

The chart type Expense vs. revenues displays the ongoing comparison between the amounts in management, planning and budgets pages. The list represents you all amounts, cumulated by revenues (planned revenues, actual revenues) and expenses (planned expenses, actual expenses (time tracking), actual expenses):

Element	Description
Planned expenses (resources	Expeneses of all activities from the planning page. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing costs. TIP For more information about the group purchasing costs see Create and edit groups.
Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of type planned expenses are totalled.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of type planned revenues are totalled.
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. TIP For more information about the group purchasing costs see Create and edit groups.
Actual expenses	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of type actual expenses are totalled.
Actual revenues	Actual revenues from the budget page. Method: Budget documents of type actual revenues are totalled.

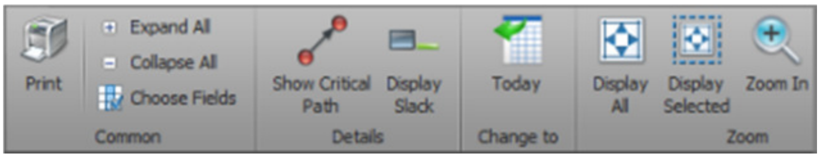
New features in InLoox PM 7

Design and comfort

Article content

User interface

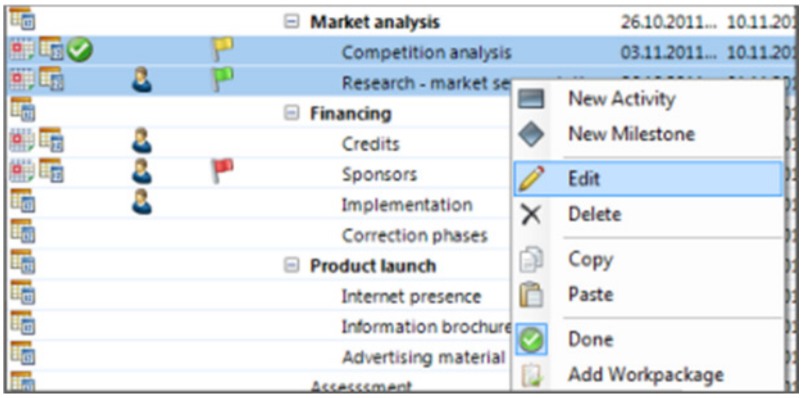
The new user interface of InLoox PM 7 is adapted to the design of Microsoft® Outlook 2010 and offers task-oriented features and commands in the InLoox PM 7 Ribbon. For an overview of the new InLoox PM 7 Ribbon, please see Work with the InLoox PM Ribbon. Please find a more detailed explanation of the tabs in the related help categories.



Besides, the dialog boxes in InLoox PM 7 have been simplified and are now scaleable. To change the size of a dialog box, touch its edge with the mouse pointer until it changes to a double-headed arrow. Now, you can drag the dialog box to the desired size.

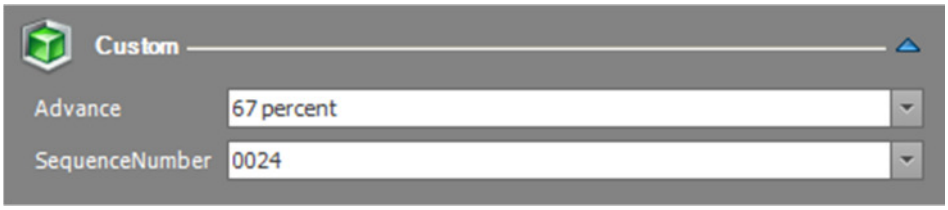
Multi-selection and multi-editing

Now, you can select several elements in InLoox PM, such as milestones, activities, documents and time tracking entries and edit them at the same time. Click therefore on the first element that you want to edit. Keep the CTRL key on your keyboard pressed and click the other elements that you want to edit at the same time. Then right-click to open the context menu and select **Edit** from the list. Now, you can edit the selected elements at the same time.



Improved custom fields

The custom fields now look and feel like standard program fields. User-defined fields are no longer displayed as a list and allow direct input.



TIP Find out more at Create custom fields.

Planning

Article content

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- Dependencies
- Slack
- Lags
- Backward scheduling
- Skill management
- Undo and redo
- Individual working time calendars

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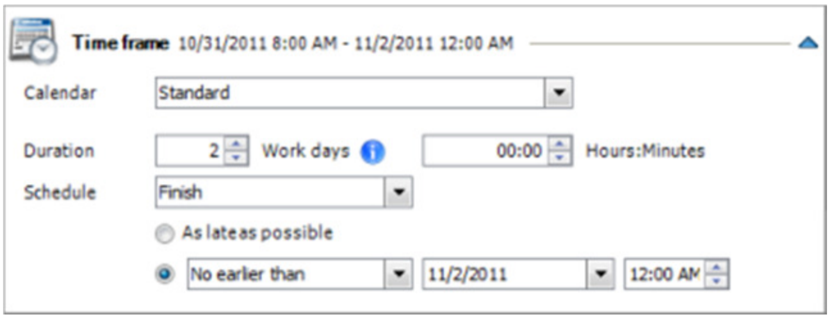
Constraints

In InLoox PM 7, you can set time constraints for activities and milestones in your project plan, such as:

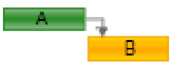
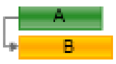
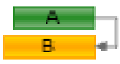
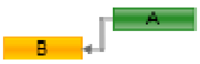


Then, InLoox PM 7 integrates the respective planning element according to this specification in the project planning.

TIP For more information on constraints, please see [Create planning element dependencies](#).

Dependencies

With dependencies, you can define logical relationships between planning elements and therefore use methods of the network planning. InLoox PM 7 offers the following dependencies:

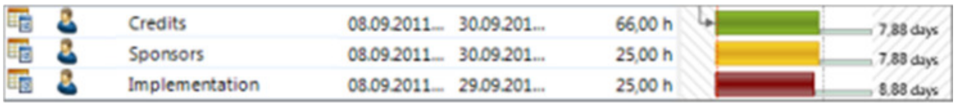
Dependency	Example
End-to-Start	
Start-to-Start	
End-to-End	
Start-to-End	

TIP For more information, please see [Create planning element dependencies](#).

Slack

InLoox PM 7 indicates how far you can postpone a planning element until this affects the planned duration of your project. To display the slack, click in the planning on the **View** tab in the **Details** group **Display Slack** 

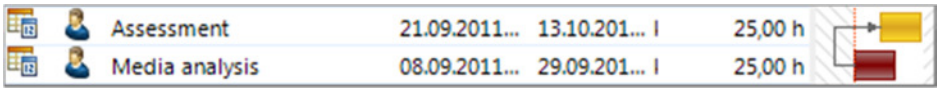
. The slack for each planning element is then displayed directly in the Gantt chart.



Lags

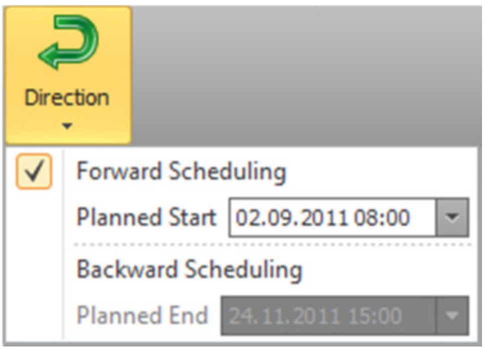
Now, you can use positive and negative time lags between planning elements in your project planning. So, you can easily depict overlaps in time of planning elements as well as lead and waiting times.

TIP For more information, please see Create dependencies between planning elements.



Backward scheduling

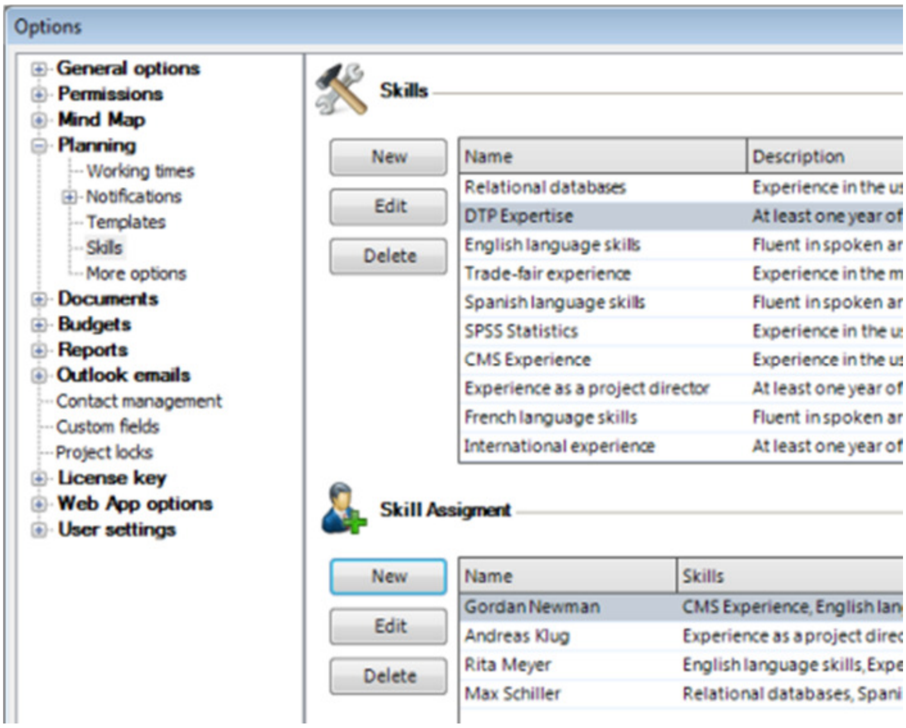
InLoox PM 7 offers you both planning directions, forward scheduling and now, also, backward scheduling. Now you can decide whether you want to develop your project plan from your current starting point or based on the desired project results.



TIP For more information, please see Backward scheduling.

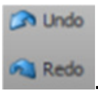
Skill management

Enter the skills of your team members in the InLoox PM options. As soon as you have created the respective skills in the InLoox PM options and you have assigned them to one or several resources, you can search for the specific skills whenever you want to add a resource in the project.



TIPS For more information about how to assign skills to resources, please see Assign skills to resources. For more information on how to open the InLoox PM options, please see Open the InLoox PM options.

Undo and redo

InLoox PM 7 enables you to reverse entries or to restore cancelled entries. Click therefore in the planning on the **Edit** tab, in the **Edit** group, **Undo** to reverse the latest entry or click **Redo** to restore a reversed entry 
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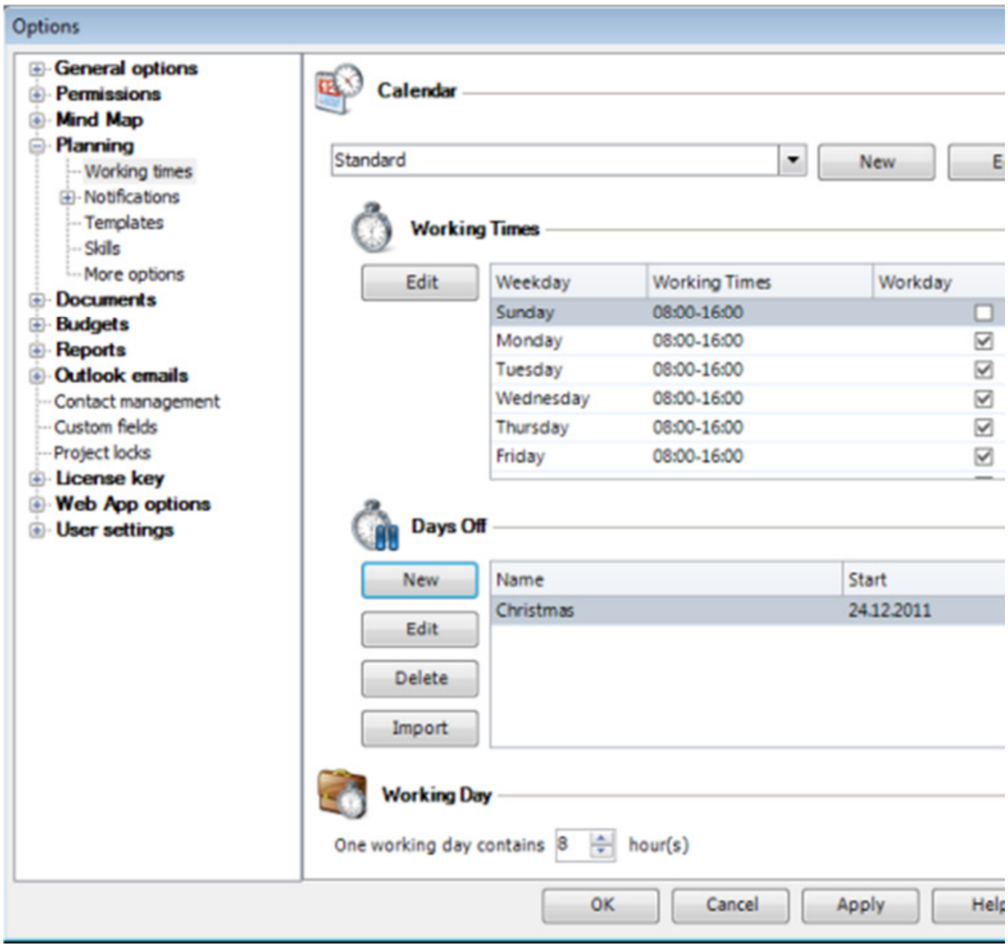
Individual working time calendars

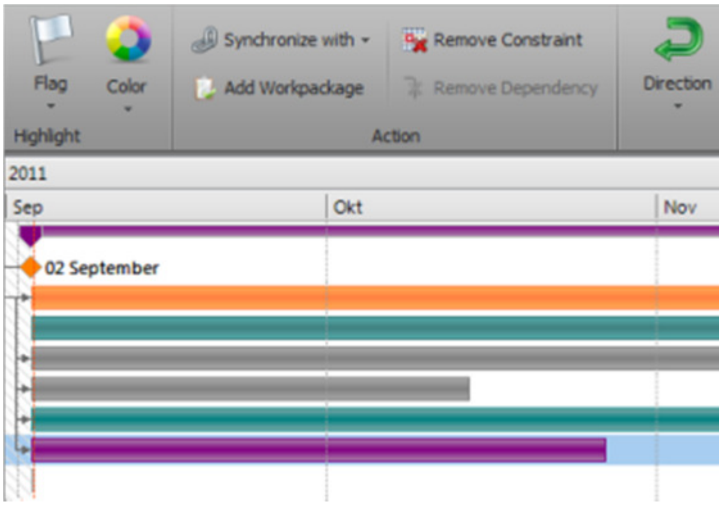
In the InLoox PM options, you can now create individual working time calendars with which you can integrate for example part-time, shift or weekend work. With several individual working time calendars, you can include different working times or holidays at different company sites. Then, you can assign different working time calendars to the different elements in the project planning.



TIP For more information, please see Set a working time calendar.

Individual color settings

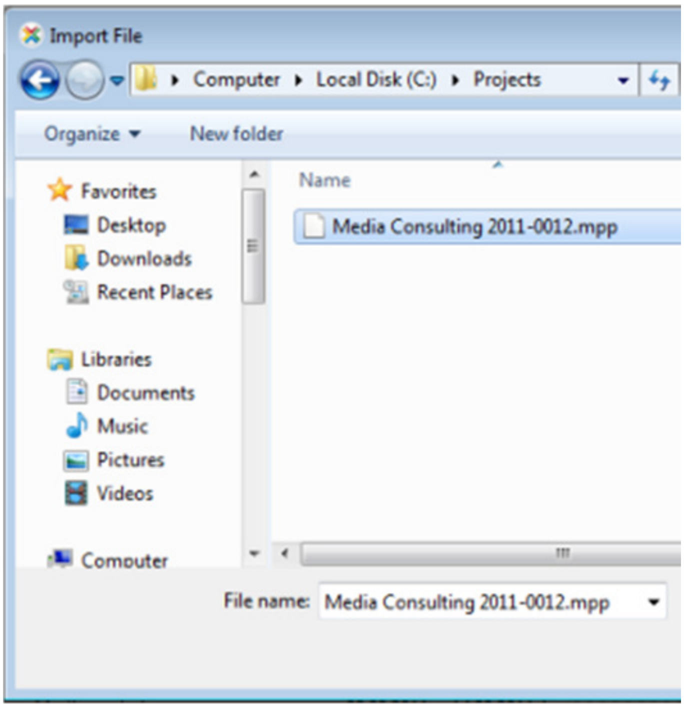
Now, you can highlight planning elements in the planning in user-defined colors, e.g. to mark departmental responsibilities or to highlight priorities. Select therefore a planning element from the planning and click **Color** in the **Highlight** group on the **Edit** tab. The planning element is then displayed in the selected color in the Gantt chart.



TIP For more information on how to customize the view of your planning, please see Work with the planning.

Import of Microsoft Project 2010 files

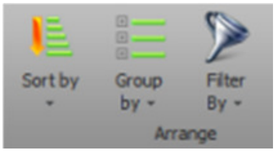
With InLoox PM 7, you can exchange project plans between InLoox PM and Microsoft Project 2010. So, you can generate or read Microsoft Project 2010 files directly in InLoox PM.



TIPS For more information on how to import Microsoft Project files, please see Import a planning file. For information on how you can generate Microsoft Project files in InLoox PM, please see Manage planning templates.

Filter, sort and group

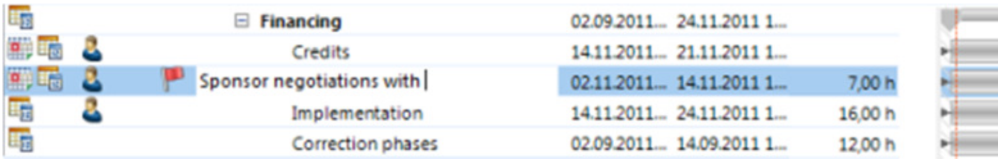
Filter, sort and group your project planning according to your individual information needs. These features help you to keep the overview especially of extensive project plans. You find them in the planning on the **View** tab in the **Arrange** group.



TIP For more information on how you can display your planning filtered, sorted or grouped by specified criteria, please see the Adjust a view section in the article Work with the planning.

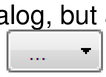
Edit in the line

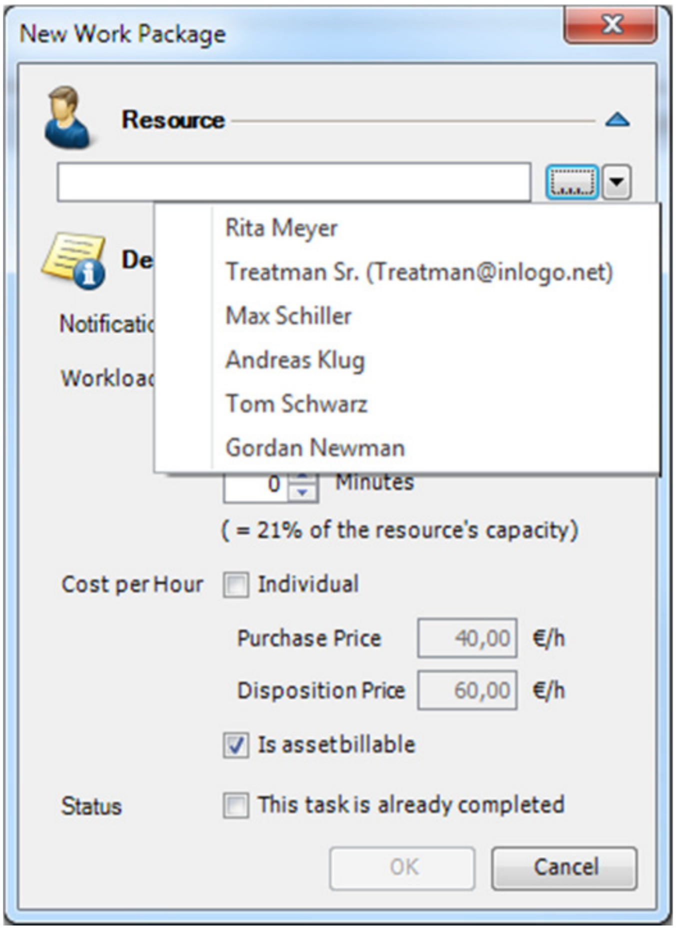
In InLoox PM 7 it is no longer necessary to open planning elements and to edit them in a dialog box - you can do this directly in the line. Click therefore in the planning in the line of the planning element that you want to adjust and change its name, start or end date.



TIP For more information on this topic, please see Work with the planning.

Quick selection of resources

Now, you cannot only assign project resources in InLoox PM via the Select Contact dialog, but also via quick selection, e.g. in mind maps, in the time tracking or the planning. Click the arrow  to receive a compact pre-selection of often deployed resources.



Please see the respective help categories to receive more information on this topic.

Project communication

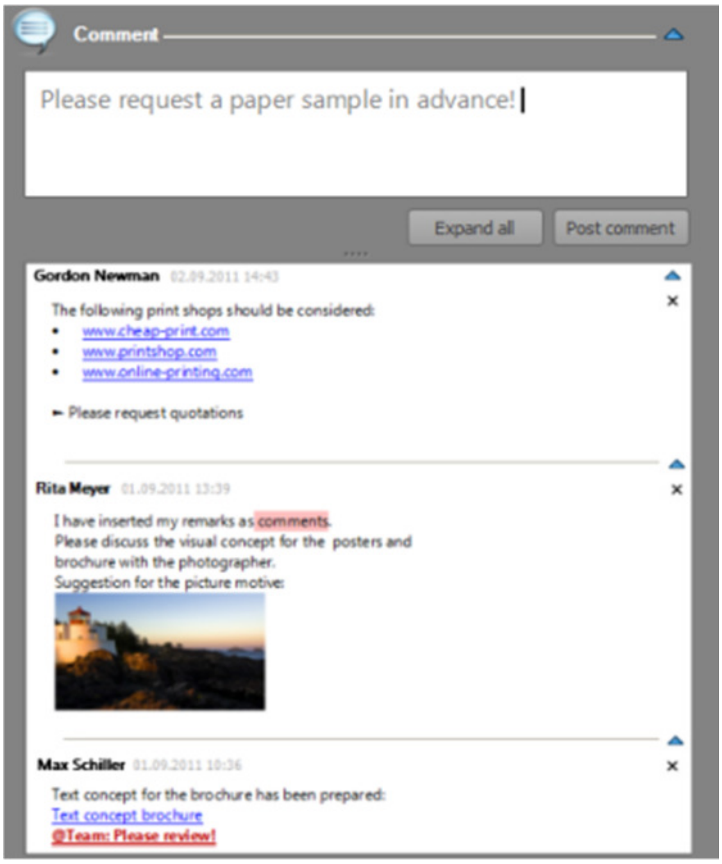
Article content

Project comments

Text formatting

Project comments

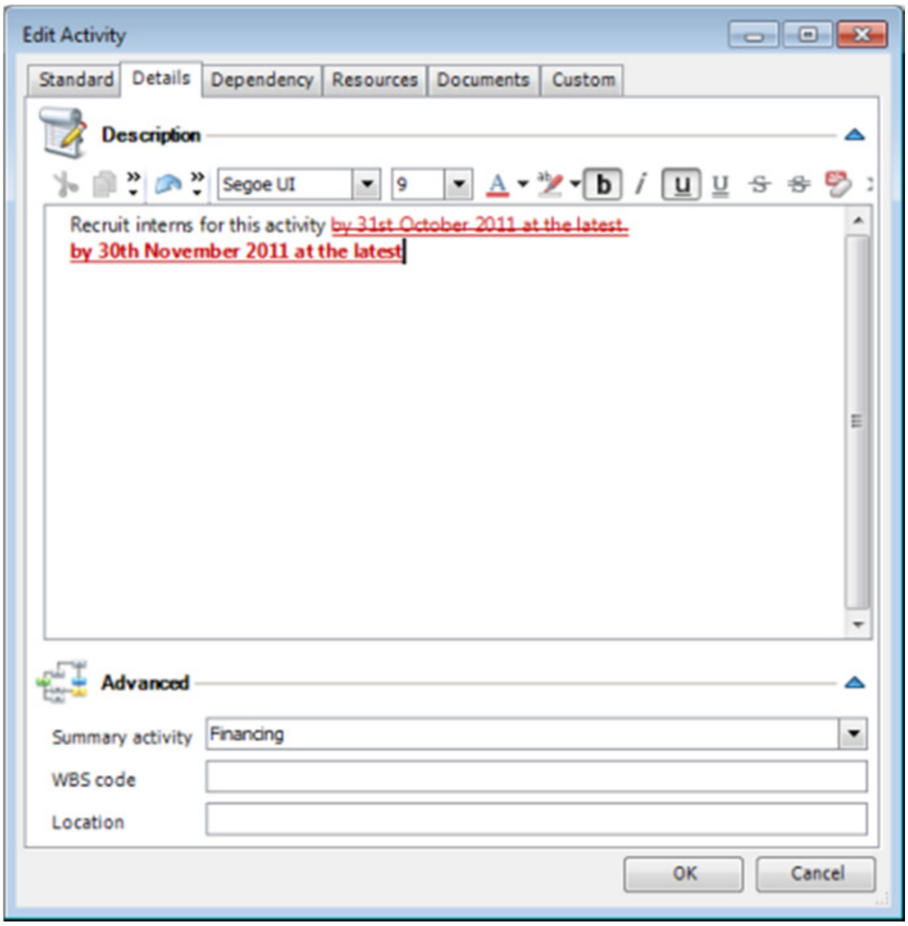
On the **Management** page, you can now exchange comments on the project as formatted text, link or image with other team members. In the comment history, you can track the exchange of information.



TIP For more detailed information on how to use the comment feature, please see Create and change comments.

Text formatting

Use in InLoox PM 7 text formatting, images, hyperlinks, colors and symbols to concisely convey additional information about activities, time tracking entries, budgets and documents. Double-click the respective element in InLoox PM and select the **Details** tab in the dialog box. There, you can enter notes and format them as you like.

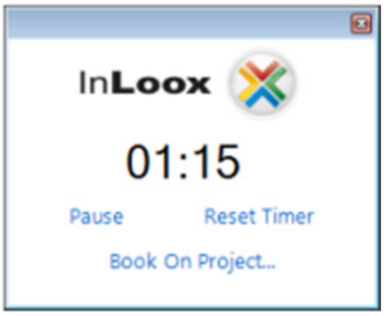


TIP For more detailed information, please see the respective help categories.

Time tracking

Time tracking with the stop watch

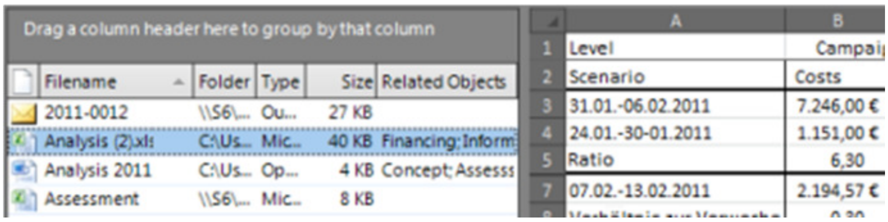
Record your own time efforts with the integrated stop watch to-the-minute. Afterwards, you can post the working time directly to the respective project. You find the stop watch on the **InLoox PM Ribbon** on the **InLoox PM** tab in the **Extras** group.



Article content

Document preview

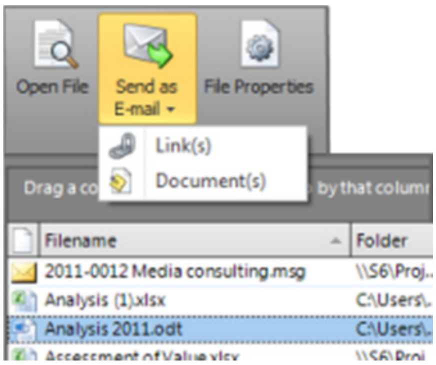
InLoox PM 7 offers a preview of documents and images with an installed preview handler. Click on the **Documents** page, in the document list, the line of the respective document. You find the document preview in the window on the right.



TIP For more information on how you can find the Documents page and for more detailed information on the topic, please see Work with the document list.

Direct mailing

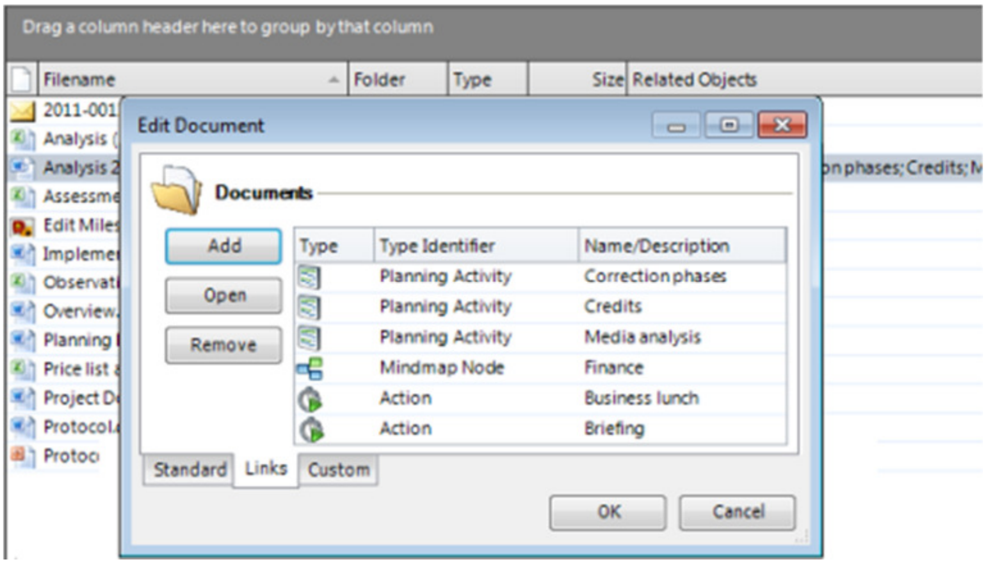
Now, you can send your project documents directly from the InLoox PM documents folder as e-mail. Mark the respective document on the Documents page in the list. Then click **Send as E-mail** on the **Edit** tab in the **Documents** group. Choose whether you want to send the document or the documents as **Link(s)** or as **Document(s)**. Then, you can add the recipient of the e-mail and, if you like, additional text and you can distribute the document as an e-mail.



TIP For more information on how you can open the Documents page and on the topic, please see Work with the document list.

One-stop document management

The InLoox PM document list now offers a current overview of all project documents and document links in use. So, you can navigate directly from the document list to the linked mind map, planning or time tracking element or open the related project document directly from the element.

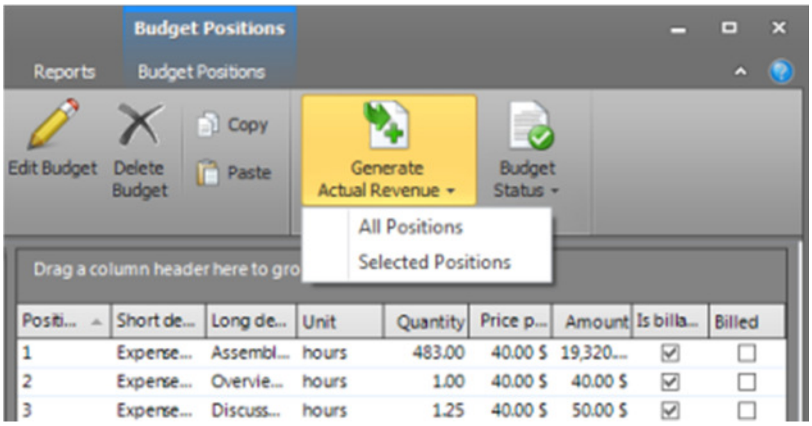


TIP For more detailed information on this topic, please see Create and edit a document and the respective help categories.

Budgets

Improved Budgeting

Now, you can see in detail which automatic planned costs for planned resources are included in your project budget. Yet another improvement is the possibility to decide whether you want to include all budget positions or only selected positions into your project billing.



TIP For more information, please see Budgets.

Reports

Create a report

At the push of a button, the highly flexible report designer issues reports such as project summaries, budget lists, expense reports and plan/actual comparisons in a variety of file formats like Microsoft Excel, Microsoft Word, HTML, PDF and many more.

1. Click **Projects** on the **Outlook Ribbon** to switch to the **InLoox PM project overview**.

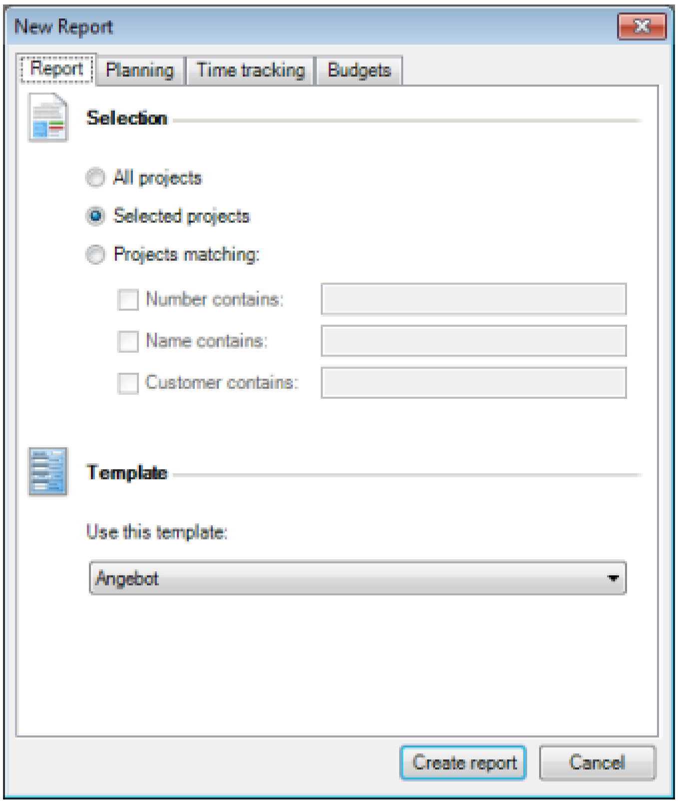
   NOTE In Outlook 2003/2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Choose one or more project in the project list.
3. On the **InLoox PM** tab, in the **Reports** group, click **Reports** and choose from the drop-down **Create Report**.

   NOTE

   In Outlook 2003/2007 click **Reports** in the **InLoox PM Toolbar**.

4. In the **New Report** dialog box, in the **Selection** area choose **All project**, or **Selected projects**, or **Projectts matching**.



5. Optionally you can filter the report data in this dialog box.

   TIP For more information see Filter the report data.

6. Optionally you can save a report for quick access.

   TIP For more information see Manage the saved reports.

7. Click **Create report** after you have made all changes you want.
8. In the **Print Options** dialog box choose the settings you want:
   - In the **Print Target** area, in the **Direct to...** filed choose in the drop-down list the output format, e.g. PDF, Excel or Word.
   - In the **Options** area specify individual pages or sets of pages to be printed.
   - Click **Start**.

Filter report data

Report designer issues reports of any level of detail, e.g. by single activities, whole projects or for the whole company. Consolidation, aggregating and filtering are available for detailed reports and only for authorized users.

NOTE The filtering process for the saved reporst is the same as for the new reports.

1. Click **Projectlist** on the **Outlook Ribbon** to switch to the **InLoox PM project overview**.

NOTE In Outlook 2003/2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Choose one or more project in the project list.
3. In the **InLoox PM** tab, in the **Reports** group, click **Reports** and choose from the drop-down **Create Report**.

NOTE In Outlook 2003/2007 click **Reports** in the **InLoox PM Toolbar**.

4. In the **New Report** dialog box do one or more of the following:
   - **Filter the report data in the Report tab**
     - In the **Selection** area choose between **All projects**, **Selected projects** or **Projects matching**. For the last option you can define the filter criterion such as **Number**, **Name** or **Customer** that the selected project contains.
     - In the **Template** area choose a template from the drop-down list.

       TIP For more information on how to create a report template, see Manage report templates.
   - **Filter the report data in the Planning tab**
     - Choose **All planning items** to include the complete list of planning elements.
     - Choose **Planning items matching** to define, which planning items, **summaries**, **activities** or **milestones**, will be included into the report. You can specify their combination by selecting the corresponding check box.
     - Optionally you can choose the time interval by selecting **Date between** and by choosing the date.
   - **Filter the report data in the Time Tracking tab**
     - Choose **All entries** to include the complete list of time tracking entries.
     - Choose **Time tracking entries matching** to filter between **Date**, **Performed by** and **Group**. You can specify their combination by selecting the corresponding check box.
   - **Filter the report data in the Budgets tab**
     - Choose **All Budgets** to include the complete list of budgets and budget position.
     - Choose **Budgets matching** to filter between Expenses (actual (time tracking), actual (other), revenues (plan), expenses (plan), revenues (plan)), Date and Status. You can specify their combination by selecting the corresponding check box.
     - In the **Show positions** area selected the positions you want (**Already billed**, **Not billed**, **Billable** and **Not billable**)
5. Click **Create report** after you made all changes you want.

TIP For more information on how to create a report, see Create a report.

Manage the saved reports

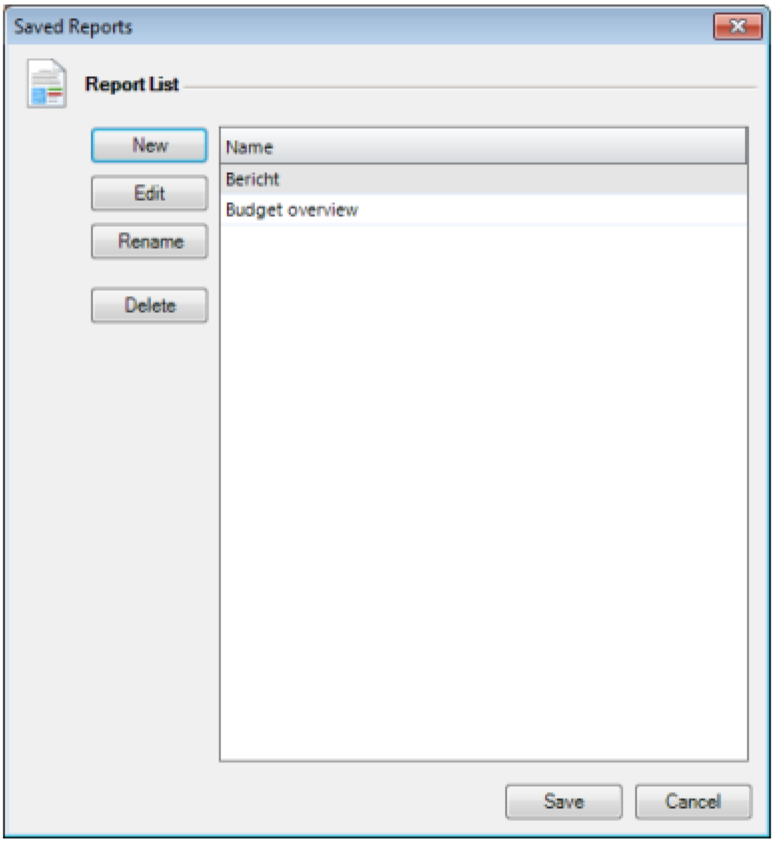
You can save the reports with the predefined filter data for quick report issue.

Do the following to save a report:

1. Click **Projects** on the **Outlook Ribbon** to switch to the InLoox PM project list.

NOTE In Outlook 2003/2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Choose one or more project in the project list.
3. On the **InLoox** tab, in the **Reports** group, click **Reports** and choose from the drop-down **Save Report**.
   NOTE In Outlook 2003/2007 click **Reports** in the **InLoox PM Toolbar**.
4. In the **Saved Reports** dialog box do the following:



   - Save a new report by clicking **New**.
     - In the **Report Filter** dialog box type a name and click **OK**.
     - In order to filter it click **Edit** in the **Saved Reports** dialog box.
     - In the **Report** dialog box filter the report data as you want and click **Save Report**. The saved report is now displayed in the **Report List**, in the **Saved Reports** dialog box.

       TIP For more information on how to filter a report, see Filter report data.

   - Change the saved report. Choose one from the **Report List** and click **Edit**. In the **Report** dialog box filter the report data as you want and click **Save Report**.

     TIP For more information on how to filter a report, see Filter report data.

   - Rename the saved report. Choose one from the **Report List** and click Rename. In the **Report Filter** dialog box type a new name and click **OK**.
   - Remove the saved report from the **Report List** by clicking **Delete**.
5. Click **Save** to save the changes.

Manage the report templates

You can customize the report templates as you want in the InLoox PM options. InLoox PM provides you with such different templates like schedule, budget overview, plan-actual comparison, cross-projects time sheets, memos, status report, cover letter, billing and offer templates. From the first moment you have the right tool for your project daily routine.

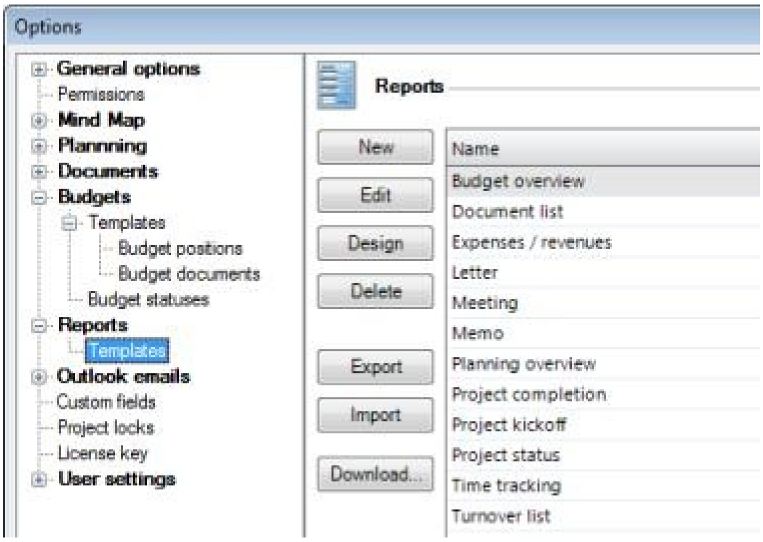
TIP For more information about report types see Report types.

IMPORTANT A user requires read access and permission for using report templates to export the project data. For more information on how to assign permissions and the lis of available permissions, see Setup permissions and List of permissions.

1. Open the dialog box **InLoox PM Options**.

   TIP For more information, where you can find the InLoox PM options, see Open the InLoox PM options.

2. Under **Reports** click **Templates**. On the right side you will see the **Reports** area:



3. Do one or more of the following:
   - Create a new template by clicking **New**. In the **Report** dialog box, in the **Name of the report** field, type a name.
     Define also for which project page this report template will be created. Select the corresponding check box in the **Show as quickreport** in area. Click **OK**.
   - Change the existing template. Choose one from the list and click **Edit**. In the **Report** dialog box make the changes you want as it is described in the first point.
   - Change the template content by clicking **Design**. In the **InLoox PM Report Design** dialog box make the changes you want.

     TIP For some information on how to work with the report designer, see Work with the report designer. For the hole information see the included help in the **Report Designer** dialog box.

   - Remove the existing template from the list by clicking **Delete**.

- Save a template in your local documents. Choose one template from the list and click **Export**.
- Load e template from your local data, which you have received from other users. Click **Import** and choose a template in the **Open Report Template** dialog box, and then click **Open**.
- Click **Download** to download the report templates from our website.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Work with the report designer

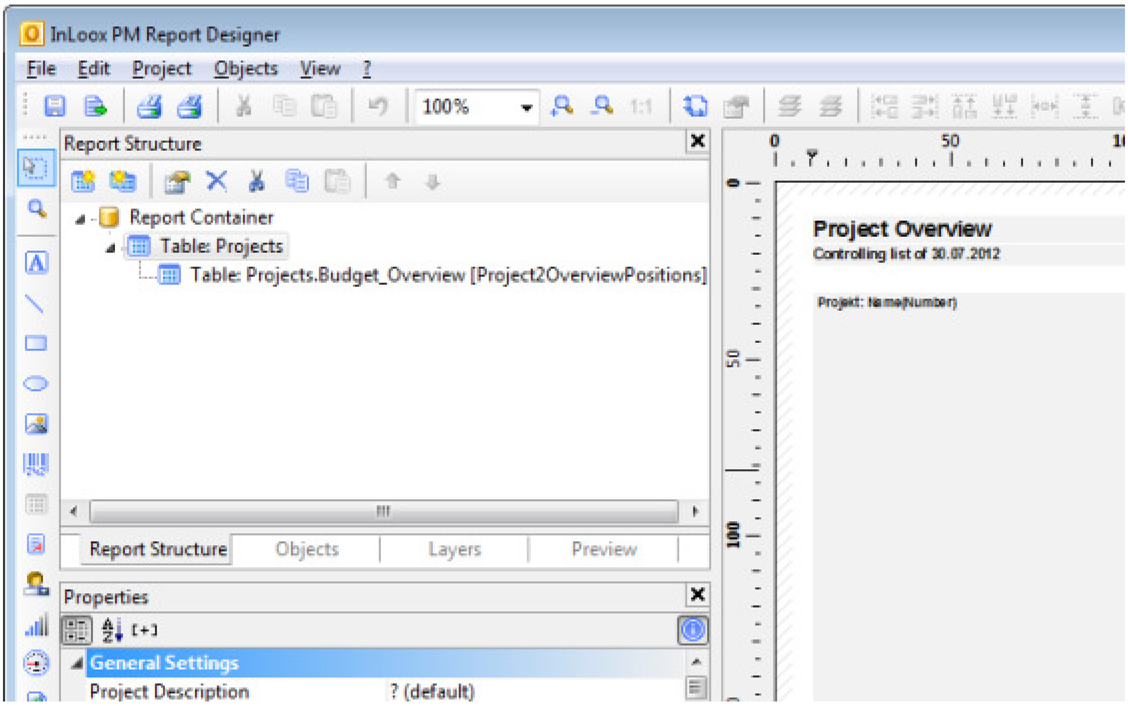
Customize the template content for report in the InLoox PM report designer that is available in the InLoox PM options.

IMPORTANT Please note that this chapter describes only the first steps for the report designer. The complete help document you will find in the **InLoox PM Report Designer** dialog box.

1. Open the dialog box **InLoox PM Options**.

   TIP For more information, where you can find the InLoox PM options, see Open the InLoox PM options.

2. Under **Reports** click **Templates**. On the right side you will see the **Reports** area:
3. In the **Reports** area choose one template, e.g. Time tracking, from the list, which you want to change, and click **Design**.
4. The following gives an example of how to add an additional data column to the **Time tracking** report in the **InLoox** PM **Report Designer** dialog box.



   1. In the **InLoox PM Report Designer** dialog box click **Report Structure**.
   2. In the **Report Structure** area above double-click **Table: Projects.Time Tracking**.
   3. In the **Table Contents** dialog box, in the **Data Line** tab choose one line and click .

4. In the **Edit Table** dialog box, in the **Data and Functions** tab, in the tree structure click **Fields**, then **Projects** and afterwards **Time Tracking**.
5. Under **Time Tracking** choose the **ChangedBy** field, and click **Insert** and then **OK**. The added field is displayed in the right side of the **Table Contents** dialog box in the **(Contents)** field.
6. In the **Edit Table** dialog box, in the **Header Line** tab, click ▾ and choose **Text** from the drop-down list.
7. In the **Edit Table** dialog box, in the **Data and Functions** tab enter into the lower text field the text (including quotation marks): **"Changed by"**.
8. Click **OK**.
9. Click again **OK**.
10. In the **InLoox PM Report Designer** dialog box click **File** and then **Save**.
11. Click again **File** and then **Close**.

5. Click **OK** or **Apply** to save the changes in the InLoox System.

Types of report templates

InLoox PM provides you with different types of report templates.

The description of each template is available in this table.

Report template	Application in InLoox PM
Project kick-off	Correspondence at start of project.
Letter	Correspondence concerning the project.
Project status	Outlook email with current project status.
Meeting	Meeting organization document.
Memo	Memorandum.
Planning overview	For exporting planning items from the planning page or across all projects in the InLoox PM project list.
Document list	For exporting documents from the document page.
Time tracking	For exporting time tracking entries from the time tracking page across all projects in the InLoox PM project list.
Budget overview	For exporting data from the budget page or across all projects in the InLoox PM project list.
Expenses / revenues	For exporting budgets of type expenses and revenues from the budget page or across all projects in the InLoox PM project list.
Turnover list	For exporting turnover lists from selected projects in the InLoox PM project list.
Project completion	Correspondence at end of project.

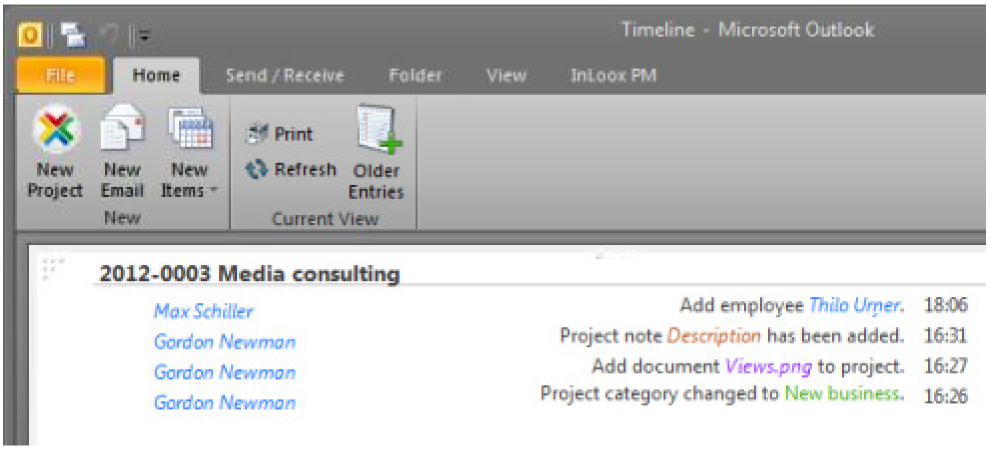
Timeline

Work with timeline

This feature allows you to trace all changes made to the project. Every change, made by a member of the project team, is recorded in the timeline, when the project is saved. It provides you with the information about all changes with project name, time and description, with the hyperlink for the attached documents, etc. The timeline helps you to stay up-to-date, special when several participants work with the same project.

Click **InLoox PM** tab on the **Outlook Ribbon** and then **Timeline**, in the **Views** group.

NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Timeline** in the InLoox PM project list.



Now you can see the recorded changes to the projects as a single entry.

- Click project name to open it.
- Tha contacts are marked in blue. Click it to open.
- The added documents are marked in pink. Click the hyperlink to open them.
- The following information from the **Manage** project page are marked in green: project name and number, division, customer, category, status, schedule (start and end).
- The saved comments are marked in red. Click it to view.
- You can also delete any entry by clicking the cross symbol.

NOTE Click **Refresh** to update the change history.

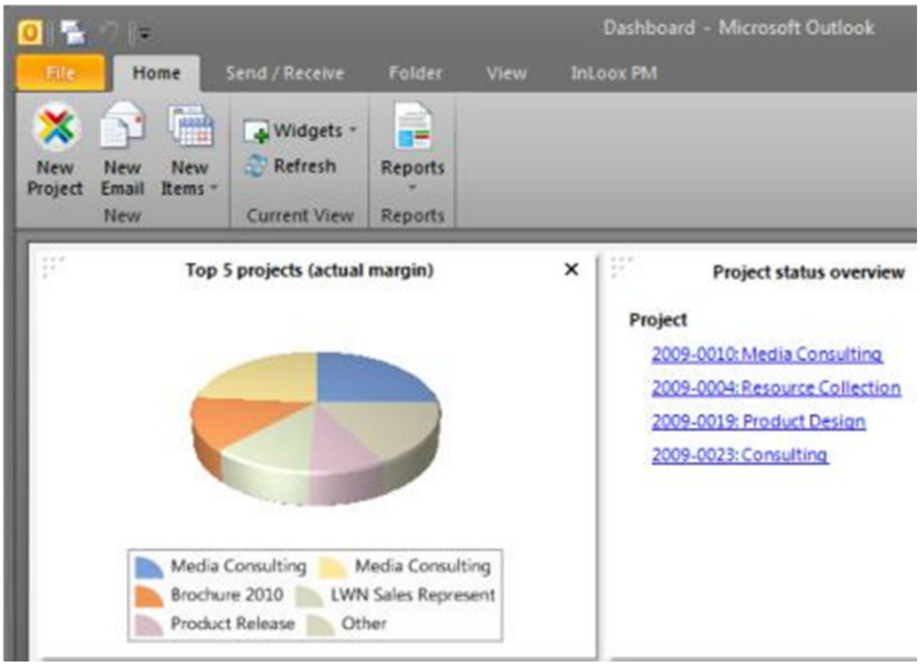
Dashboard view

Adjust the dashboard view

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

1. Click **InLoox PM** tab on the **Outlook Ribbon** and then **Dashboard**, in the **Views** group.

   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Dashboard** in the InLoox PM project list.



2. In the Dashboard view, perform one or more of the following actions:
   - **Create a personal dashboard view** On the **InLoox PM Ribbon**, in the **Start tab**, in the **Current View** group, click **Widgets**.
     - Choose the widgets that you want from the drop-down list, e.g. **Project status overview** or **Top 5 projects (actual margin)**.

       TIP For details on the different widgets, please see Widget types.

3. **Refresh** All changes are updated and the view is reloaded when clicking the **Refresh** button in the **Current View** group.
4. **Issue a report** Optionally, you can also issue a report on this view by clicking **Reports** in the **Reports** group.

   TIP For more information about reports see the category Reports.

TIP For more information about reports see the category Reports.

NOTE Double-click on the entry in the widget list to open the corresponding project.

Information rules in the dashboard view

The critical projects are marked with a red point.

Widget types

The dashboard contains all relevant and project-related information to analyze, control and compare your projects. Create your personal dashboard with an individual selection of widgets. The dashboard provides you with a graphical overview and lists.

TIP For more information, see Adjust the dashboard view.

In this table you find the descriptions of the widgets with which you can furnish your dashboard.

Widgets	**Description**
My open work packages	Shows you all your open InLoox PM work packages.
Project manager view (open work packages)	Shows you all open InLoox PM work packages from all the projects you control as a project manager.
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 the 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 current year and the last year.
Actual expenses/actual revenues (month)	Shows the system-wide actual expenses and actual revenues of the current month and the last 11 months.
Actual expenses/actual revenues (quarter)	Shows the system-wide actual expenses and actual revenues of the current quarter and the last 3 quarters.
Actual expenses/actual revenues (year)	Shows the system-wide actual expenses and actual revenues of the current year and the last year.
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.

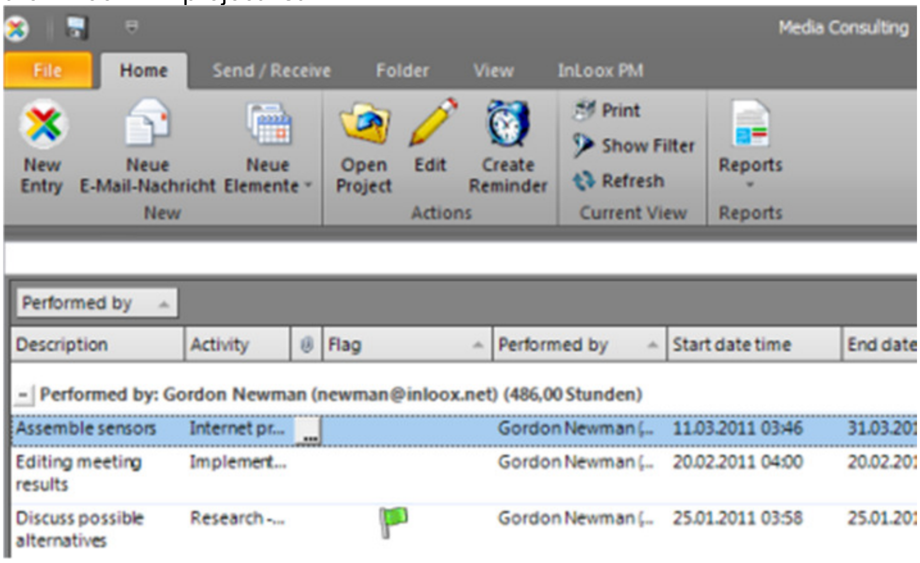
Time tracking view

Adjust the time tracking view

The time tracking enables you to create time tracking entries without opening a project and provides you with the overview of the time tracking entries from all current projects.

Article content

Work with the time tracking view

1. Click the **InLoox PM** tab on the **Outlook Ribbon** and then **Time Tracking**.
   NOTE In Outlook 2003/2007, click **InLoox Folder** in the **InLoox PM Toolbar** and then **Timeline** in the InLoox PM project list.
   

2. Perform one or more of the following actions:
   - **Create a new entry** In the **New** group, click **New Entry**. In the **Add to Project** dialog box, choose a project from the list and click **OK**. In the **New Entry** dialog box, fill out the fields.

     TIP For more information, see Create and edit a time tracking entry.

   - **Open a project** Choose an entry from the time tracking list and click **Open Project** in the **Actions** group.

- **Edit an entry** Choose an entry from the time tracking list and click **Edit** in the **Actions** group. In the **Edit Item** dialog box make the changes you want.

  TIP For more information, see Create and edit a time tracking entry.

- **Create Reminder** Choose an entry from the time tracking list and click **Create Reminder** in the **Actions** group.

  TIP For more information, see Create a reminder.

- **Print the time tracking view** Click **Print** to start the quick print feature of the time tracking view.

  TIP For more information about printing, see General features and printing of the project list, in the **Print in the project list**.

- **Search for the entries by using a filter** In the **Current View** group, click **Show Filter**.
  - In the **Edit Filter** dialog box, choose between **All actions** and **Entries matching**.
  - By clicking **Entries matching**, define the filter criterion and activate the corresponding check box. The available criteria are **Date between**, **Performed by**, **Group**.
  - Click **OK**.
    In the Time tracking list, those entries are displayed, which correspond with the defined criteria.
- **Refresh** All changes will be updated and the view reloaded via the **Refresh** button in the **Current View** group.
- **Issue a report** Optionally, you can also issue a report on this view by clicking **Reports** in the **Reports** group.
  TIP For more information about reports, see the category Reports.

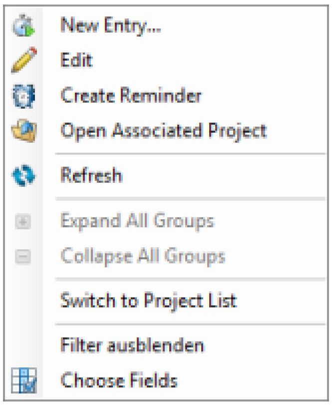
Features of the time tracking list

The following features can be found in the time tracking list:

- **Open an entry** Double-click on one item in the time tracking list or right-click on the item to open the context menu and choose **Open** from the list.
- **Group the time tracking list** Draw the column name into the area above the list.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the InLoox PM Ribbon, such as **New Entry..**, **Edit**, **Create Reminder**, **Open Associated Project**, **Refresh** , **Show Filter**. It has also provides the features **Expand** and **Collapse All Groups** and **Switch to Project list**. Right-click in the time tracking list to open the context menu.



- **Choose Fields** This feature sorts and organizes the entries by selected data.
  - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column headers.
  - Reset the fields via Drag and Drop back into the dialog box.

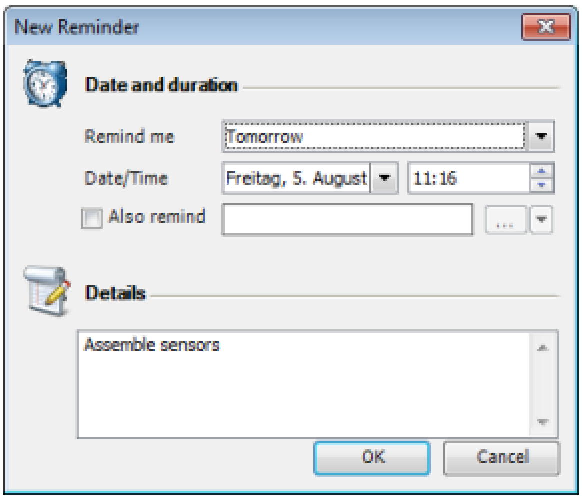
Create a reminder

You can create a reminder for each time tracking entry, e.g. call again.

1. Click the **InLoox PM** tab on the **Outlook Ribbon**, then click **Time Tracking**.
   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Timeline** in the InLoox PM project list.
2. Choose an entry from the **Time Tracking** list.
3. In the **Start** tab, in the **Actions** group, click **Create Reminder**.

   NOTE In Outlook 2003/2007, click **Create Reminder** in the InLoox PM project list.

4. In the **New Reminder** dialog box, perform the following actions:

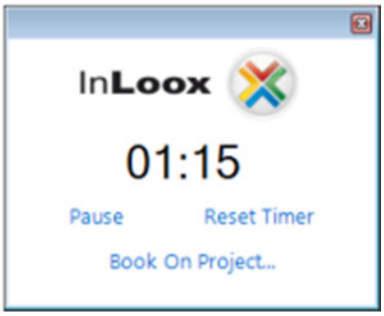


   1. In the **Date and duration** area, choose from the **Remind me** drop-down list an option.
   2. In the **Date/Time** box, choose the date and time for the reminder.
   3. Optionally, you can send a reminder to other persons:

    1. Activate the **Also remind** check box.
    2. Click and choose from the **Select Contact** dialog box a name.
    3. Click **OK**.
4. In the **Details** area, type additional notes.
5. Click **OK**.
   Now, you can see the new reminder in your Outlook calendar at the time you have entered.

Record personal time efforts with the stop watch

Record your personal working times up-to-the minute with the InLoox PM stop watch. Afterwards, you can book the recorded working time to a project. This facilitates the consistent and complete documentation of activities for purposes such as billing.



1. Click the **InLoox PM** tab on the **Outlook Ribbon** and then **Stop Watch** in the **Extras** group.
2. Now, the stop watch box is displayed at the bottom.
3. Perform the following actions in this dialog box:
    - Click **Start** to start recording.
    - You can pause the time tracking by clicking **Pause**.
    - You can reset the stop watch by clicking **Reset**.
4. Click **Add to Project...**, if you have finished time tracking.
5. On the dialog box **Add to Project** perform the following actions:
    1. In the project list, choose a project, to which you want to add the time tracking entry.

       TIPS

        - Use the **filter** to display only projects that meet the defined criterion. For more information, see Search and find projects.
        - Use the command **Recent projects**. The drop-down list displays projects you opened recently, organized by numbers.
        - Click **Clear selection**, if you want to change the choice.
    2. Click **OK**.
    3. Fill in the **New Item** dialog box with the required information.
       TIP For more information see Create and edit a time tracking entry.

NOTE The context menu contains several commands to adjust the project list view. Right-click in the project list to open the context menu.

- **Expand or reduce the project list view** Change the view by clicking **Expand All** or **Collapse All** to structure the project list.
- **Choose Fields** This feature sorts and organizes the project by selected data.

- On the **Choose Fields** dialog box, click one field, e.g. **Budget critical**, and drag it into the column headers.
- Reset the fields via Drag and Drop back into the dialog box.

Project archive

Archive a project

File completed projects comfortably in the project archive. If needed, you can access them again. The archive improves the overview and keeps your project list clear.

1. Click **Projects** in the **Outlook Ribbon** to open the **InLoox PM project list**.
2. Choose a completed or inactive project from the list.
3. On the **InLoox PM** tab, in the **Views** group, click **Archive**.

NOTE Alternatively, click **Archive project** in the context menu. Right-click on one of the projects in the project list to open the context menu.
You can see now the archived project in the InLoox PM archive view.

Archive a project from the project form

1. Open an existing project or create a new one.

TIP For more information on how to create a project, see Create a project.

2. On the **Edit** tab, in the **Status** group, click **Archived**.
3. Click **Save and Close**.

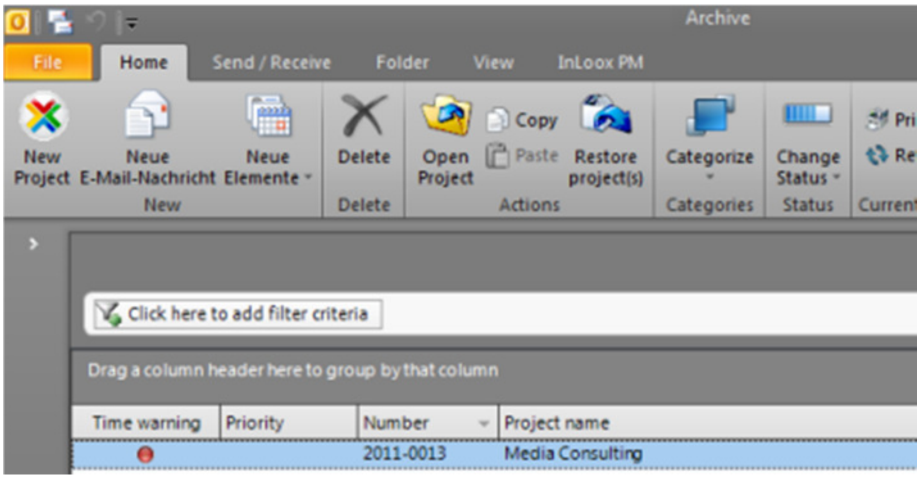
Adjust the archive view

Each archive entry shows information on a project in the archive. Only authorized users can see the projects.

Article content

Work with the archive view

1. Click the **InLoox PM** tab on the **Outlook Ribbon** and then **Time Tracking**.
   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Time Tracking** in the InLoox PM project list.



2. Perform one or more of the following actions:
   - **Create a new project** Click **New Project** in the **New** group.

     NOTE The newly created project is displayed in the InLoox PM project list. Click the **InLoox PM** tab and then **Projects** in the **View** group.

   - **Delete project** Remove a selected project by clicking the **Delete** button.

     TIP For more information, see Copy and delete projects.

   - **Open, copy and paste a project** These buttons can be found in the **Actions** group .The **Copy** and **Paste** features help you to create projects quickly. You can change them as you want.
   - **Restore project** Choose a project from the list and click **Restore** in the **Actions** group.

     NOTE The restored project is displayed in the InLoox PM project list. Click the **InLoox PM** tab and then **Projects** in the **View** group.

   - **Categorize a project** Choose a project from the list and click **Categorize** in the **Categories** group. Assign a category to the project without opening it.
   - **Change status** You can also change a status or a degree of completion of the selected project in the list. Click **Change Status** and choose from the list the respective status, e.g. **started** or **completed**..

     TIPS

     - For more information see How to add further information in the status / date area.
     - You can save or edit a new project status type in the InLoox PM options. For more information see Change the project status.
   - **Print an archive view** In the **Current View** group, click **Print** to start the quick print feature of the archive view.

TIP For more information about printing, see General features and print of the project list, in the **Print in the project list** area.

- **Refresh** Via the **Refresh** button in the **Current View** group all changes will be updated and the view reloaded.
- **Issue a report** Optionally, you can also issue a report on this view by clicking **Reports** in the **Reports** group.

TIP For more information about reports see the category Reports.

Features in the archive overview

The following features can be found in the project archive:

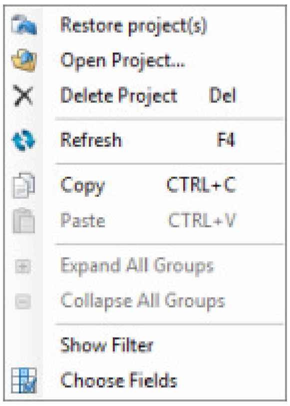
- **Open a project** Double-click on one item in the list or right-click on the item to open the context menu and choose **Open** from the list.

- **Search the projects** The **search bar** permits to find quickly any information also within a project. You can also use filter feature.

TIP For more information see Search and find projects.

Features in the context menu

The context menu provides you with almost all basic features that are also on the InLoox PM Ribbon, such as **Restore project(s)...**, **Open Project**, **Delete Project**, **Refresh**, **Copy** and **Paste**. It has also such features as **Expand** and **Collapse All Groups**, **Show Filter**. Right-click in the list to open the context menu.



- **Choose Fields** This feature sorts and organizes the projects by important data.
  - On the **Choose Fields** dialog box click one field, e.g. **Customer**, and drag it into the column headers.
  - Reset the fields per Drag&Drop into the dialog box.

Information rules in the project list

The completed or cancelled projects are struck through and marked grey in the project list.

Keyboard shortcut

- **F4** Create a new project.
- **F2** Refresh the project list.
- **CTRG+P** Print the project list.
- **CTRG+C** Copy a project into the clipboard.
- **CTRG+V** Paste a project from the clipboard to the project list.

InLoox PM contacts

Activate the contact management

Due to the contact management, InLoox PM can be used with full functionality without Microsoft Exchange Server and can, also, be combined with alternative groupware servers. Administrators can activate or deactivate the InLoox PM contact manager in the InLoox PM options, according to their individual requirements.

IMPORTANT You need administrator permissions to activate the contact management in the InLoox PM options. The InLoox PM contact management is only available in InLoox PM multi-user versions (InLoox PM Workgroup Server and InLoox PM Enterprise Server).

1. Open the **InLoox PM Options** dialog box.

   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.

2. In this dialog box, click **Contact management**. On the right side, there is the **Contact management** area:

3. Activate the **Enable InLoox PM contact management** check box.
4. Click **OK** or **Apply**
5. Restart your Outlook.
   Now, you can see the **Contact** button on the **InLoox PM Ribbon**, in the **InLoox PM** tab, in **the View** group.

   TIP For more information on how to create a new contact or to edit one, see Add a contact.

Add a contact

The InLoox PM contact manager gives users the possibility to create an "InLoox PM contact" for each project member, even if they are not available as Outlook or Exchange contacts. You can save the InLoox PM contacts and edit the information about people and organizations you communicate with.

The procedure of creating and editing is the same.

1. On the Outlook Ribbon, click the **InLoox PM** tab.
2. On the **InLoox Ribbon**, in the **Views** group, click **Contacts**.

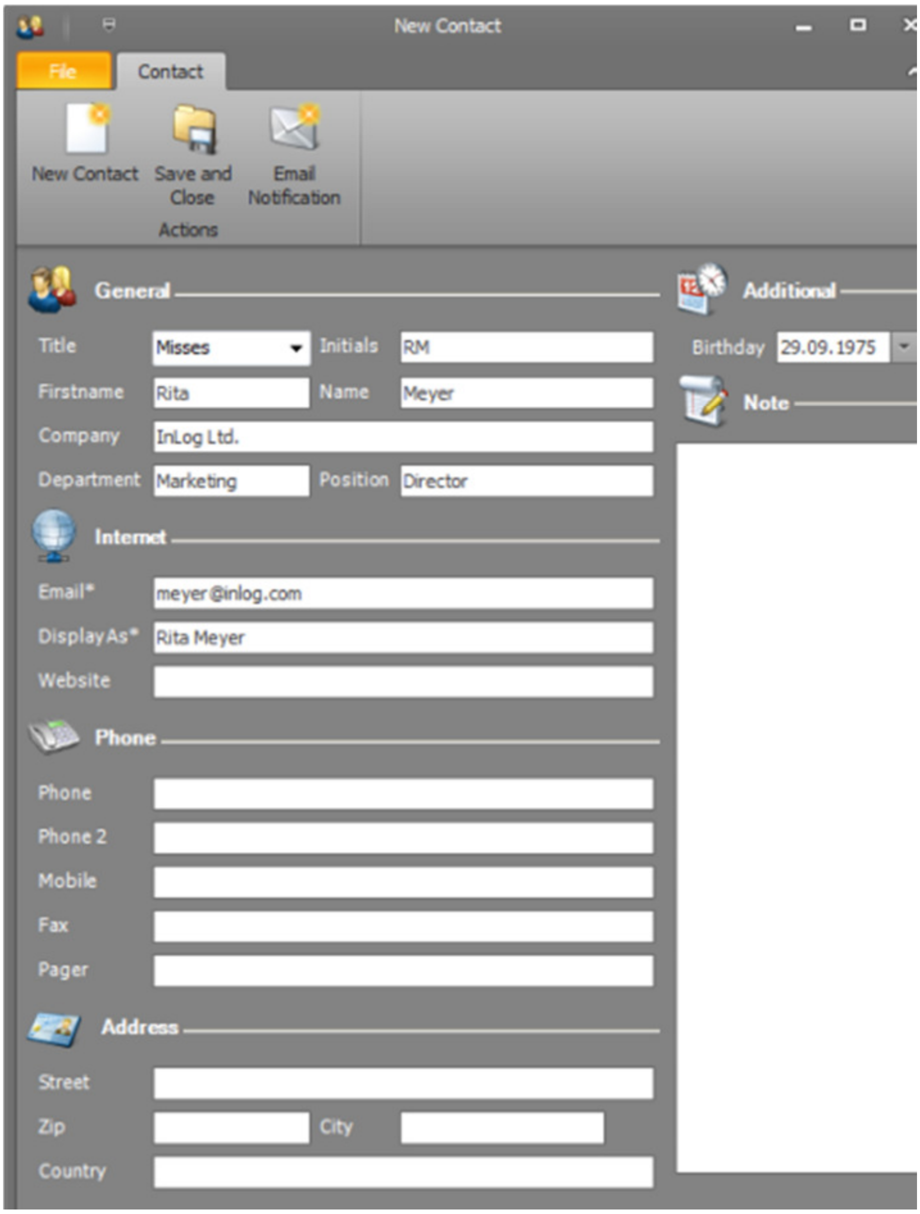
   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Contacts** in the InLoox PM project list.

3. On the **Start** tab, in the **New** group, click **New Contact**.

   NOTE In Outlook 2003/2007, click **New Contact** in the InLoox PM project list.

4. To assign a new contact to the address book choose first an address book from the drop-down list **Address Book**, then click **New Contact**.

   TIP For more information on how to assign a new address book, see Add, manage or delete an address book.
5. In the **New Contact** dialog box perform one of the following actions:



1. In the **General** area enter the general information to the contact such as **Title**, **First name**, **Name**, etc.
2. In the **Internet** and **Phone** area, enter the following information: **Email**, **Website**, **Phone**, **Fax**, **Pager**.

   NOTE For multiple phone numbers, use the fields **Phone 2** and **Mobile**.
3. In the **Address** area, type the business address information of this contact in the respective fields.
4. Optionally, you can add a birthday reminder in the **Additional** area.
5. Type a note in the **Note** area, if you want.

6. As soon as you have entered all information perform one of the following actions:
   - **Create more contacts** On the **Contact** tab, in the **Actions** group, click **New** contact.
   - **Finish entering new contacts** In the **Actions** group, click **Save and close**.
   - **Send an email notification to the contact** In the **Actions** group, click **Email notification**.

     NOTE You will find these commands as well as the command **Save** on the **File** tab.

NOTES

- The contact management must be activated in the InLoox PM options in order to create new contacts. For more information see Activate the contact management.
- The **Contact** dialog box for already saved contacts also contains the **Projects, assigned with this contact** area. There, you see all projects to which this contact is assigned. The standard grouping is set according to the project roles.

Authorize InLoox PM contacts

InLoox PM enables project managers to provide InLoox PM contacts with the necessary authorizations. The InLoox PM contact can be, for example, allocated as a resource in a project and be notified of upcoming project tasks.

1. Activate the contact management in the InLoox PM options.

   TIP For more information see Activate the contact management.

2. Now, you can add new InLoox PM contacts.

   TIP For more information, see Add a contact.

3. Create a new InLoox PM account in the InLoox PM options.

   TIP For more information, see Create an InLoox PM account.

4. Set user-based permissions for the created InLoox PM contact.

   TIP For more information, see Set up permissions.

Optionally, you can set the permissions in the project, on the management page.

1. Open an existing project or create a new one.

   TIP For more information on how to create a project, see Create a project.

2. On the **Management** page, in the **In charge** area add team members for the project. Choose a contact from the InLoox PM address book.

   TIP For more information, see Add project team members.

3. Click **Save and Close**.
   With role-based permissions, the InLoox PM contacts get access to those projects, where they are involved as team members.

   TIP For more information, see List of the permissions.

Add, manage or delete an address book

You can add or manage the InLoox address books in the **Contacts** view. The InLoox address book is a collection of address books or address lists, created from your InLoox PM contacts.

1. On the **Outlook Ribbon**, click the **InLoox** tab.
2. On the **InLoox Ribbon**, in the **Views** group, click **Contacts**.

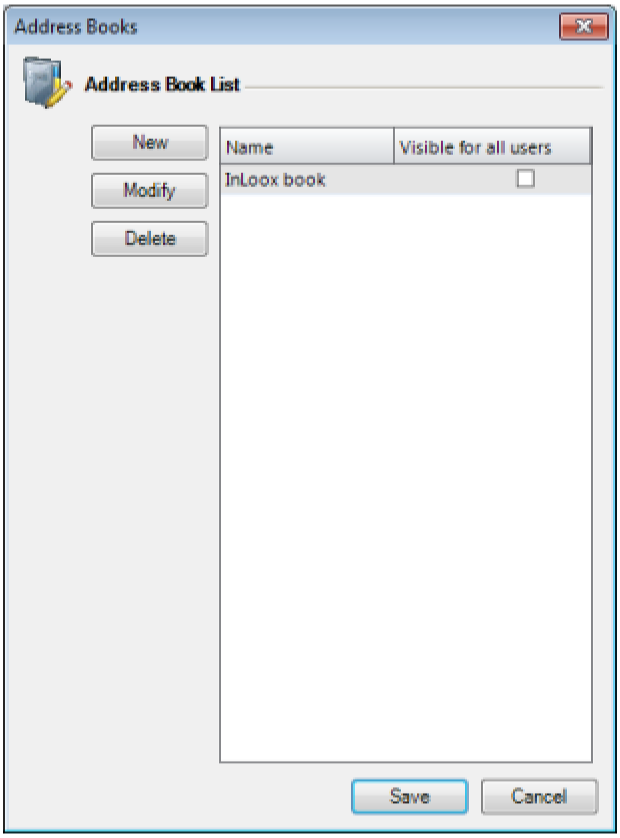
   NOTE In Outlook 2003/2007, click **InLoox Folder** in the **InLoox Toolbar** and then **Contacts** in the InLoox PM project list.

3. On the **Start** tab, in the **New** group, click **Address book**.

   NOTE

   In Outlook 2003/2007, click **Address book** in the InLoox PM project list.

4. Choose **Manage Address Books...** from the drop-down list.
5. In the **Address Books** dialog box perform one of the following actions:



   - **Create a new address book** Click **New**. In the **Create Address Book** dialog box, type a name in the **Address Book Name** area.
     Activate the **Visible for all users** check box, if you want to share this address book with the other users. Click **OK**.
   - **Edit an existing address book** Choose an address book from the list and click **Modify**. The further procedure is the same as in the point above.

- **Remove an existing address book** Choose one address book from the list and click **Delete**.

6. Click **Save**.
7. Restart Outlook.
   Now, you can see all changes in the drop-down list **Address book**.

Adjust the contact view

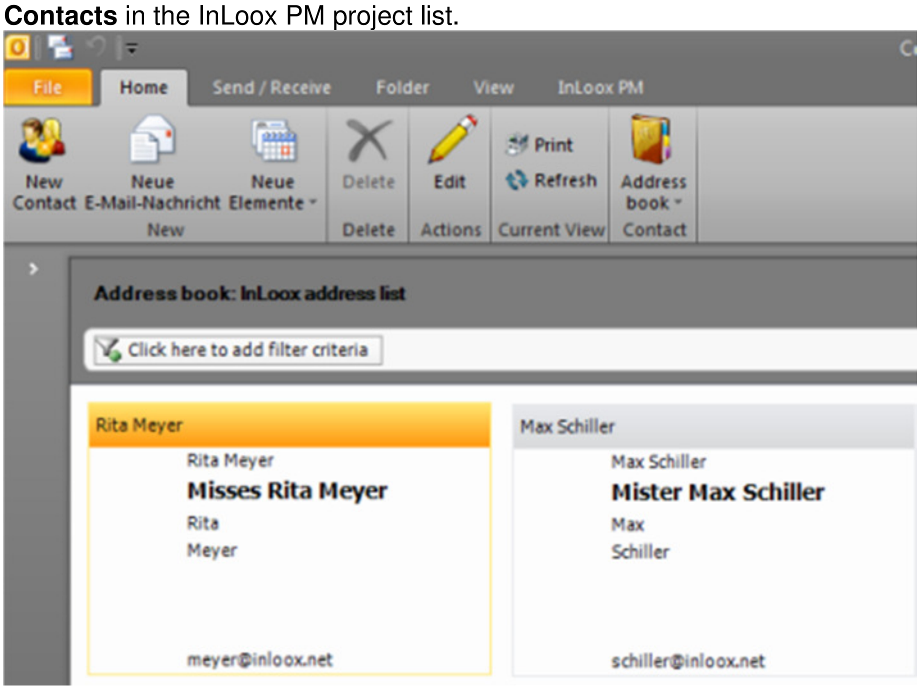
The contact view displays all existing address books and their contacts. It also provides with different features to comfortably manage contacts and address books.

Article content

Work with the contact list

1. On the **Outlook Ribbon**, click the **InLoox** PM tab.
2. On the **InLoox PM Ribbon**, in the **Views** group, click **Contacts**.

NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Contacts** in the InLoox PM project list.



3. Do one of the following:
   - **Create a new contact** In the **New** group, click **New Contact**.

TIP For more information, see Add a contact.

- ○ **Delete a contact** Remove one contact by clicking **Delete** in the **Delete** group.
- ○ **Edit a contact** Choose a contact from the list and click **Edit** in the **Actions** group.
- ○ **Print the contact list** In the **Current View** group, click **Print** to start the quick print feature of the contact list.

TIP For more information about printing, see General features and printing of the project list, in the **Print in the project list** area.

- ○ **Refresh** By clicking the **Refresh** button in the **Current View** group, all changes are updated and the view is reloaded.
- ○ **Create a new address book and manage it** In the **Contact** group, click **Address book** and choose from the drop-down list **Manage Address Book**.

TIP For more information, see Add, manage and delete an address book.

Features in the contact list

The following features can be found in the contact list:

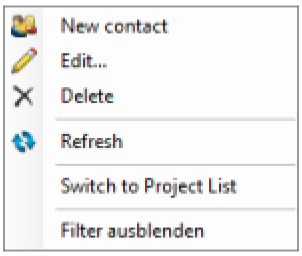
- **Open a contact** Double-click on one item in the list, e.g. to edit it.
- **Search the contacts** The **search bar** permits to find quickly any contact.

TIP For more information about this feature see Search and find projects.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the InLoox PM Ribbon, such as **New contact**, **Edit...**, **Delete** and **Refresh**. It also provides features such as **Switch to Project List** and **Show Filter**. Right-click in the list to open the context menu.

TIP For more information about the filter feature, see Search and find projects.



Keyboard shortcut

- **F2** Refresh the project list.
- **CTRG+P** Print the project list.

Work packages

Display and process work packages

As a project planner, you can inform project resources about assigned work packages and about the changes in project.

TIP For more information on how to assign a resource to a work package, see Add resources.

InLoox PM provides you with the following notification types:

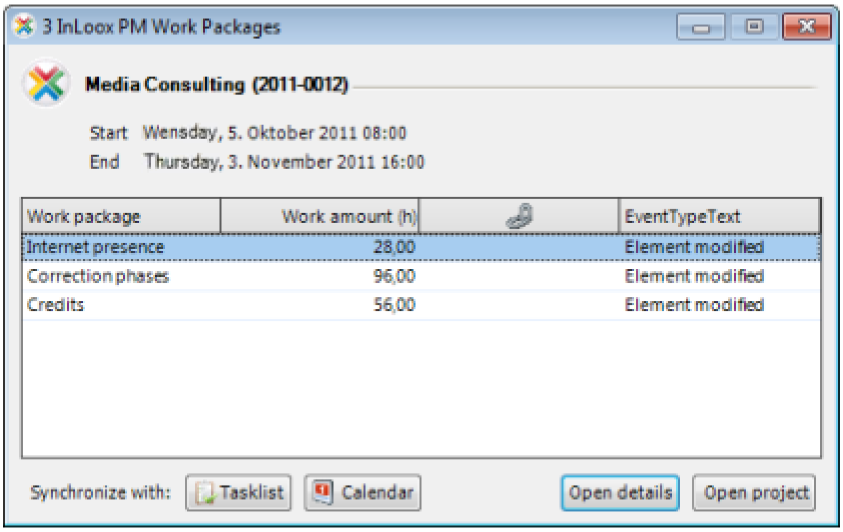
- **InLoox PM**
- **Email**
- **Outlook task request**
- **Outlook appointment request**

Find the detailed description of these types below.

Article content

Notify via InLoox PM

You will get the message **InLoox Work Packages** after you have chosen InLoox PM as notification type.



- **Display planning data** In the **InLoox PM Work Package** dialog box, double-click an entry or click **Open details** to display the work package details. The following planning data are displayed:
    - **Project name** and **number**
    - **Time frames** or **date**
    - **Work package name**
    - Your own **effort/work amount** (in hours)
    - **Current synchronization**
    - **EventTypeText**, e.g. if the planning element was changed
- **Synchronize work package with an Outlook elements** Choose one work package from the list and click one of the following Outlook elements in the Synchronize with area:
    - **Tasklist**
    - **Calendar**
- **Display the work package details** Choose one work package from the list and double-click it or click **Open details**. The following data is displayed in the **Work Package Details**dialog box:
    - **Project name** and **number**
    - Details about planning element: **Element Name**, **Start** and **End**; **Description**
    - Details about work package: added **Resource**, **Work Amount**, **Status**

      NOTES

        - This information is delivered from the project planning.
        - Change the status, if you have already done this task. InLoox PM keeps this information synchronic with the planning and displays a completed planning element with the green check mark
        - You can also open the related project by clicking **Open Project**
- **Open the related project** Choose one work package from the list and click **Open project**.

NOTE The notification type is selected by the project planner. Users without InLoox PM can only be informed via task request, meeting request or email. The project planner can also decide not to inform the resource.

Notify via E-mail

You will get an E-mail after you have chosen E-mail as notification type, for example with the subject "New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)".

The sender is the project director.

The E-mail contains the following planning data:

- **Project name** and **number**
- **Description**
- **Duration**
- Your own **effort**
- **Location**
- Involved **resources**

You perform one of the following actions:

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

or

- Decline and reply in free form in an E-mail.

Notify via Outlook task

You will receive a **task** in your Outlook task list after you have chosen an Outlook task request as notification, for example with the title "New element (Strategic Project #2007-0002) : Max Smith".

The sender is the project planner.

The task contains the following planning data:

- **Project name** and **number**
- **Description**
- **Duration**
- Your own **effort**
- **Location**
- Involved **resources**

You can perform one of the following actions:

- Enter a value in the **Status**, **Priority** and **% Complete** fields. You can also create a reminder for this task.

or

- Delete a task or mark it as completed.

Notify via Outlook meeting request

You will get an **appointment** after you have chosen Outlook appointment request as notification type, for example with the title "New element (Strategic Project #2007-0002) : Max Smith".

Sender is the project planner.

The appointment contains the following planning data:

- **Project name** and **number**
- **Description**
- **Duration**
- Your own **effort**
- **Location**
- Involved **resources**

You can perform one of the following actions:

- Create a reminder or change other options in the Outlook appointment.

or

- Decline or delete it from the calendar.

Manage the work package view

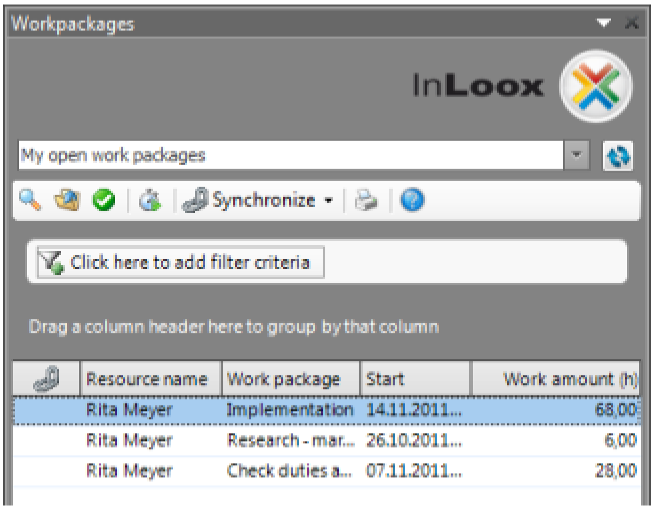
Clarify tasks and responsibilities with work packages. Assigned team members know exactly what to do, and when to do it. Work packages are in synch with the project schedule and can also be linked to Outlook appointments and tasks. Giving feedback about the progress into the project schedule couldn't be easier.

Article content

Work with the work package view

1. Click **InLoox PM** tab on the **Outlook Ribbon** and then **Show Work Package List** in the **Extras** group.

   NOTE In Outlook 2003/2007 the work packge list is automatically displayed, if you are added as resource to the work package click.



2. Do one or more of the following:
   - **Change work package view** Choose from the drop-down list:
     - **My open work package** Displays personal work package with state "open" (i.e. "to be carried out")
     - **My completed and inactive work package** Displays personal work package with state "completed".
     - **Project manager's view (open work package)** Displays 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)** Displays work packages of all members of projects of which you are manager (*) with state "completed".

   IMPORTANT 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 a **activities** and inform them via the dialog box **InLoox**.

   - **Refresh** Via the **Refresh** button all changes will be updated and the view reloaded.
   - **Display work package details** Choose one work package from the list and click **Open Details**.
   - **Open an associated project** Choose one work package from the list and click **Open Project**.
   - **Mark work package as complete** Choose one work package from the list and click **Work Package Completed**.
   - **Book a time tracking entry** Choose one work package from the list and click **Add Time Tracking Entry to Project**.
   - **Synchronize with Outlook elements** Choose one work package from the list and click **Synchronize**. Choose from the drop-down list **With Outlook Task** or **With Outlook Appointment**.
   - **Print a work package view** Click **Print** to start the quick print feature of the archive view.
   - **Open an InLoox PM help** Click **Help**.
   - **Search work packages** Use the filter feature.

   TIP For more information see Search and find projects.

    - **Group work packages** For the best overview you can group the work packages. Do the following:
        - Group by one of the column header by clicking on it and dropping to the group field above the columns.
        - Click on column header and drop it to the column headers of the list to resert the grouping.
3. On the **InLoox PM Time Tracking** area you can use the InLoox PM stop watch.
   TIP For more information see Record personal time efforts with the stop watch.

Features in the work package list

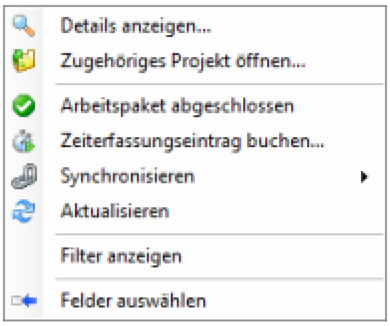
The following feature can be found in the work package list:

- **Open a work package** Double-click on an entry in the work package list. In the **Work Package Details** dialog box you can open an associated project and see the following details:

    -
        - **Project name** and **number**
        - **Element Name**, **Start** and **End** of the work package
        - **Description**
        - **Resource**
        - **Work amount** in hours
        - **State**(completed or open)
            - The planning item will be immediately marked with the check mark in the planning, if you will activate the **this work package is completed** control box.

Features in the context menu

The context menu provides you with almost all basic features that are also on the InLoox PM Ribbon, such as **Open Details...**, **Open Project**, **Open Associated Project**, **Work Package Completed**, **Synchronize**. It has also such features as **Reload** and **Show Filter**. Right-click in the list to open the context menu.



- **Choose Fields** This feature sorts and organizes the projects by important data.
    - On the **Choose Fields** dialog box click one field, e.g. **Customer**, and drag it into the column headers.
    - Reset the fields per Drag&Drop into the dialog box.

Information rules in the project list

- The work packages are marked in red, if they are overdue.

- The work packages are marked in black are on time or completed (according to the selected view).

Set up the work package refresh interval

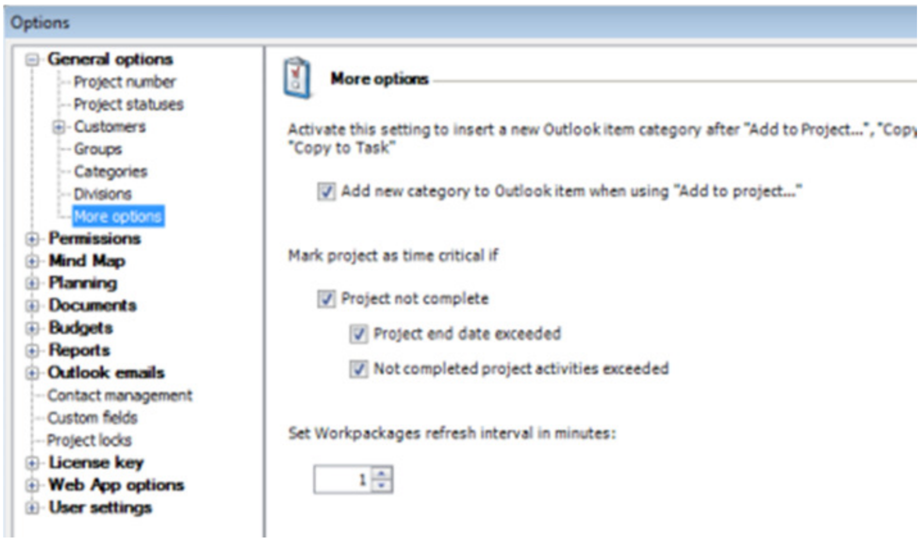
With InLoox PM you can set manually the refresh interval for work packages in the work package list.

IMPORTANT A modification can only be done by an InLoox PM user with administrator permissions.

1. Open the **InLoox PM Options** dialog box.

   TIP For more information on how to open InLoox PM options, see Open the InLoox PM options.

2. Under **General options**, click **More options**. On the right side there is the **More options** area.



3. Set up the interval, which is shown in minutes.
4. Click **OK** or **Apply.**
   The data will be saved in the data base and is valid for all InLoox PM users.

Resources

Work with resources

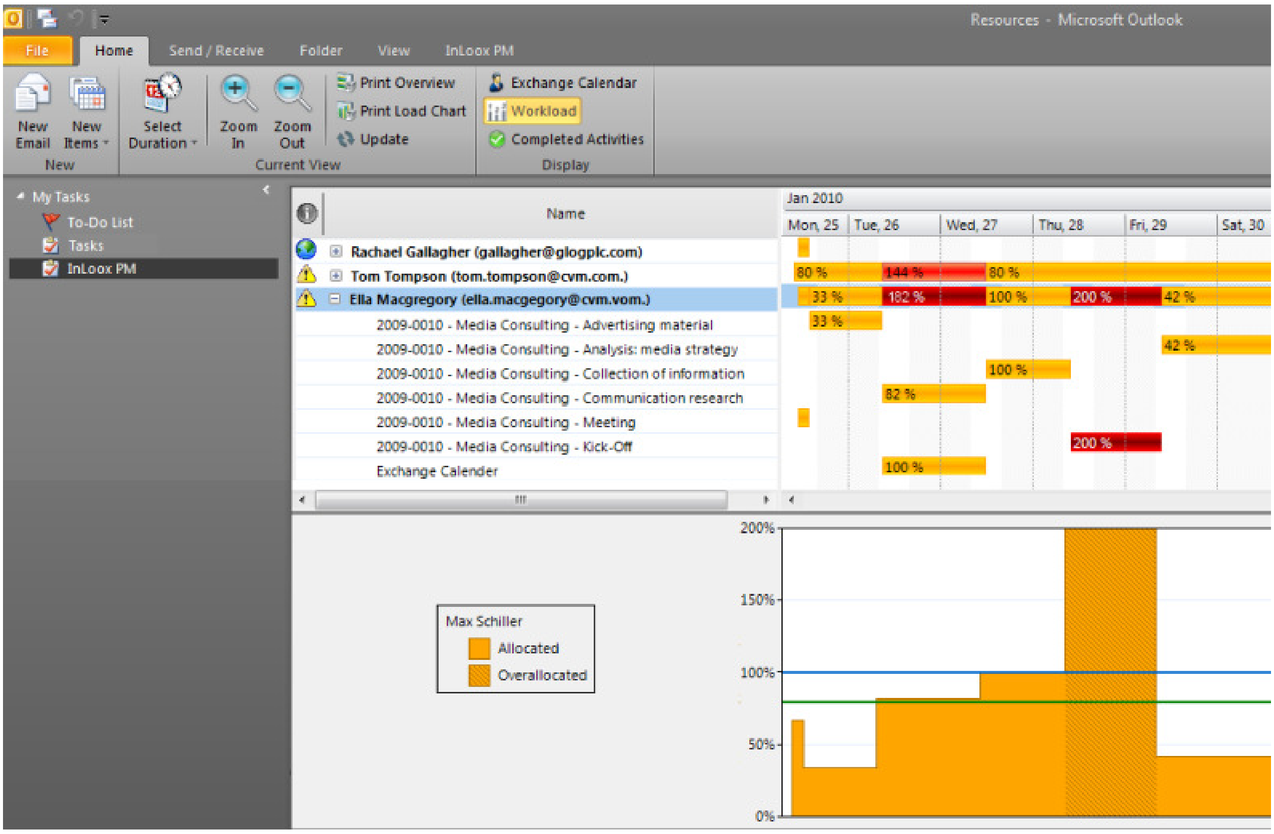
Manage the resource capability and work load more efficiently with the visual resources overview. It integrates both project work packages from InLoox PM and appointments from the Microsoft Exchange free/busy service. This way, you always have an instant and complete overview of all project resources – be it team members, rooms, or tools.

1. On the **InLoox PM** tab, in the **Views** group, click **Resources**.
2. The resource overview loads all resources system-wide.

NOTE In Outlook 2003/2007 click **Extras** in the **InLoox PM Toolbar** and choose **Resources** from the list.

TIP

You can also load resources for a specific project or for the specific planning element. For more information, see Call up and manage resources.



3. Please perform one or more of the following actions:
   - **Add a resource** To include another resource into the analysis it is necessary to add it. On the **Start** tab, in the **Resources** group, click **Add Resource**. In the **Choose Resource** dialog box, choose the required names from the list. Then click **Select**, **Ok**.

     TIP Use the feature **Search by Skill** to find select resources according to their skills. For more information, see Add project team members.
     Use this feature to always display resources with whom you work often, regardless of the filter settings.
   - **Remove a resource** On the **Start** tab, in the **Resources** group, click **Remove Resource** to delete the selected resource from the view. Use this feature to always hide resources despite of the filter settings.

     NOTE Right-click the resource list in the upper left part. Select **Display deleted resource(s)** to display them again.

   - **Define time frames** On the **Start** tab, in the **Current view** group, click **Select Duration**. Choose from the drop-down list between **Today**, **Week**, **Month** and **Year**.

NOTE All resources that are not occupied during the defined period are hidden. Use the button **Add resources** to always display resources with whom you work often, regardless of the date settings.

- **Print resources** On the **Start** tab, in the **Current view** group, click **Print Overview** or **Load Chart** to start the quick print feature of the resources.

  TIP For more information about printing, see General features and printing of the project list, in the Print in the project list section.

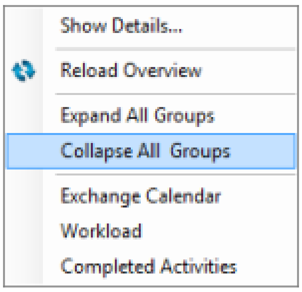
- **Refresh** Use the **Refresh** button to update all changes and reload the view. This button can be found on the **Start** tab in the **Current view** group.
- **Enlarge or reduce the resources** On the **Start** tab, in the **Current view** group, click **Zoom In** or **Zoom Out** to change the zoom level of the view. The available values are:
  - Years
  - Quarters
  - Months
  - Weeks
  - Days
  - Hours
- **Show exchange calendar** On the **Start** tab, in the **Display** group, click **Exchange Calendar**. This option displays or hides the information of the Free/Busy feature of Microsoft Exchange Server.
  InLoox PM takes account of the Exchange Server calendar information when calculating the workload, if this option is activated.
- **Show workload labels** On the **Start** tab, in the **Display** group, click **Workload Label**. This option displays the work load in percent in the time bars.
- **Show completed activities** On the **Start** tab, in the **Display** group, click **Completed Activities**. All activities with the status "done" will be displayed, if this option is activated.

NOTES Information from the free/busy-feature of Microsoft Exchange Server **cannot** be opened:

- at any time for any time period for external resources.
- in the offline mode for internal resources.

Context menu of the resources

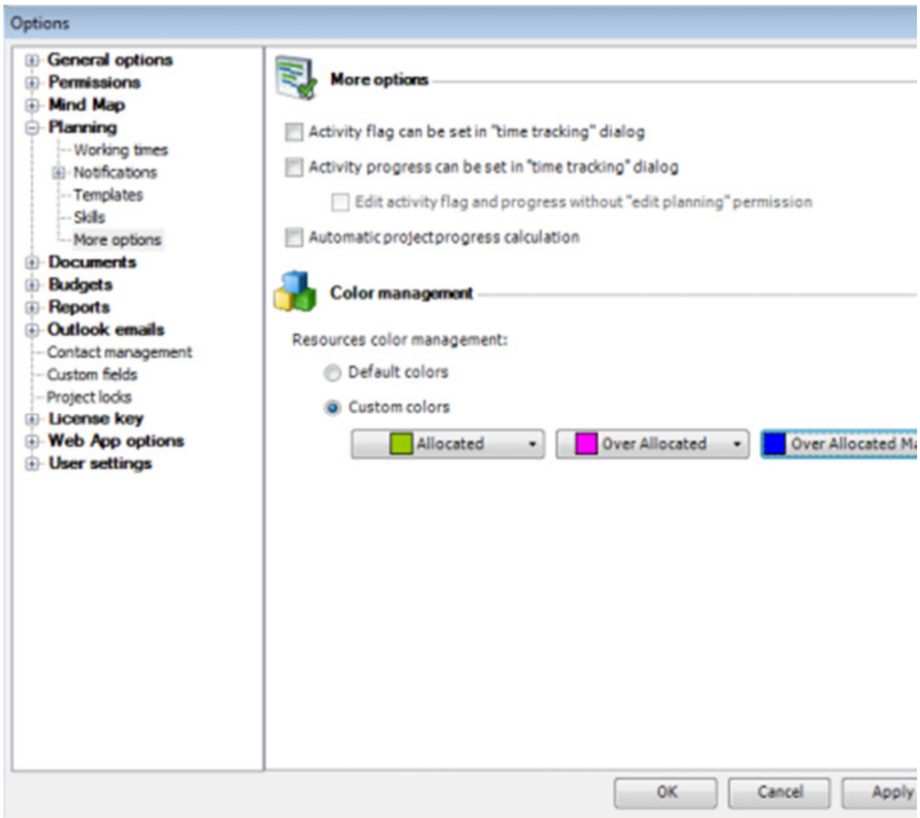
The context menu provides you with almost all basic features that can also be found on the InLoox PM Ribbon, namely **Add Resources**, **Delete Resources**, **Reset View**, **Show Exchange Calendar, Show Workload Labels and Show Completed Activities**. It also provides features of the workload diagram, like **Expand** and **Collapse All Groups**, **Show Details**. Right-click in the resource list or the workload chart to open the context menu.



Change the colour scheme of the resources

Any user can individually change the colors used in the resource overview.

1. Open the dialog box **InLoox PM Options**.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Click **Planning** in the navigation pane and then click **Planning details**. Below you find the **Color Management** area.



3. Choose between **Default Colors** or **Custom Colors**.
4. If you choose **Custom Colors** you can freely define the colors of **Allocated**, **Over Allocated** or **Over Allocated Max**.
5. Click **OK** or **Apply** to apply the colors to the resources.

Work with the workload diagram

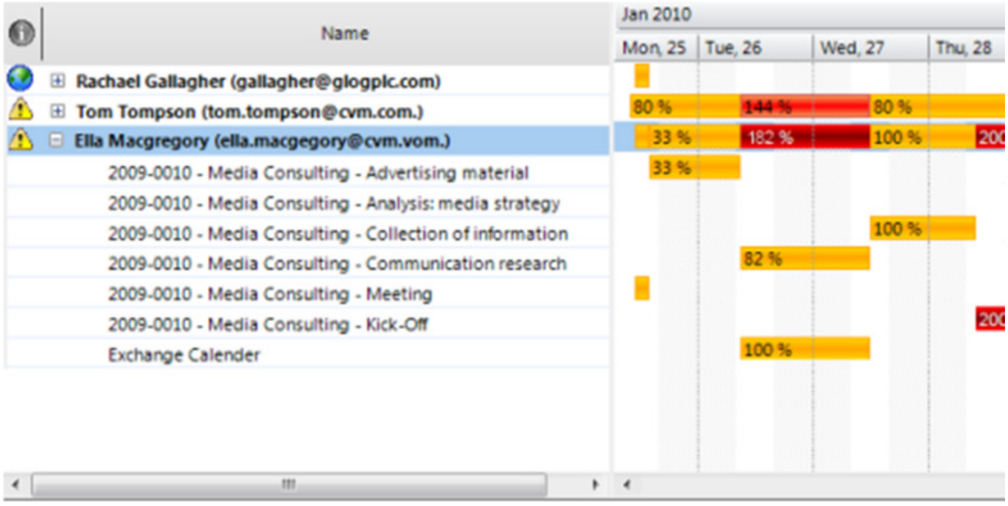
The load chart provides a central overview of the allocation of all relevant resources that is always up-to-date. Please proceed as follows to display the load chart:

Click the **InLoox PM tab**, then click in the **InLoox PM Ribbon**, in the **Views** group, **Resources**.

In this case, the **Resource Overview** loads resources system-wide.

NOTE In Outlook 2003/2007, click **Extras** in the **InLoox PM Toolbar** and choose **Resource Overview** from the list.

TIP You can also load the resource overview for a specific project. For more information, please see Call up and manage resources.



The following features are available:

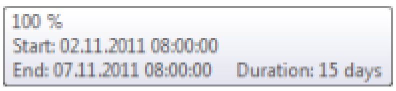
- The view always filters the resources and workloads by the time period specified by Select time period.
- Duration and degree of the workload are shown by the bars in the upper right part:
  - Yellow bar (workload 1% - 100%)
  - Red bar (workload 101% - 149%)
  - Dark red bar (workload over 150%)
- The example shows the overloading of the resource "Ella Macgregory", which 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.

- The warning symbol shows that an overbooking of a resource has occurred in the indicated period. The workload of the resource exceeds 100%. The alert icon doesn't give any information about the duration or the extent of the overbooking.
- The external resources are marked with .
- A click on the plus sign next to the resource displays the workload details. These include the projects and activities to which the resource is assigned and, in case of internal resources, also the Outlook calendar. The details of the resource can be hidden by clicking the minus sign .

- The clicking on an activity centers the workload overview.

- If the resource overview is called up from within a project, activities from other projects are shown grey.
- The details will be displayed, if the cursor is moved over a bar:



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

- A click on a resource displays a graphical overview of the workload data within the defined period. These include the projects and activities which have been assigned to that resource as well as the Exchange calendar, if the resource is internal.

- A yellow field indicates that a resource is occupied, but not overallocated in the specified time period.
- A shaded yellow field indicates that a resource is overallocated in the specified time period.

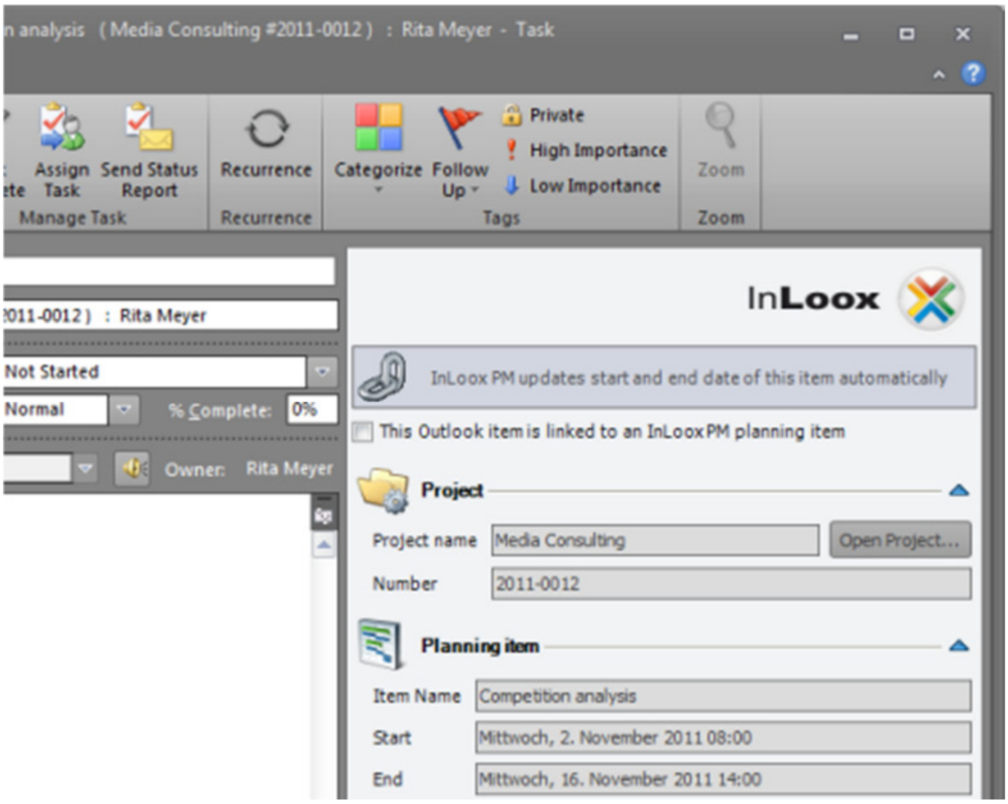
TIP You can edit several entries in the load chart at the same time by clicking the respective entries while holding down the CTRL key. Then right-click to open the context menu and perform the required action.

Interaction between InLoox PM and Outlook elements

Quick access panels for tasks and calendar

InLoox PM enables you to link Outlook tasks and appointments - by using quick access panels. InLoox PM synchronizes all information automatically.

Calendar items can be connected with milestones and activities in the InLoox PM project planning. You don't even have to open a project to gain real-time information about the respective project. Project planning changes, e.g. appointment changes, are automatically synchronized.



Article content

Synchronize with the task list / the calendar out of the project

Please follow these steps to synchronize the Outlook task list or the Outlook calendar out of a project:

1. Open the respective project by clicking **Projects** in the Outlook Ribbon. Now select the respective project from the project list and open it by double-clicking it.

   NOTE In Outlook 2003/2007, click the **InLoox PM Folder** in the **InLoox PM Toolbar**. Then double-click the respective project in the project list.

2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. Click the planning element that is supposed to be synchronized.
4. On the **Edit** tab, in the **Actions** group, click **Synchronize (With Outlook Task, With Outlook Calendar)**.
   A new Outlook element will be created in the Outlook task list or the Outlook calendar.

Synchronize with the task list / the calendar out of the InLoox PM workpackage list

This is how you can synchronize your Outlook task list or your Outlook calendar directly out of the InLoox PM workpackage list:

1. Click the **InLoox PM** tab and then **Show Workpackage List** in the **Extras** group.

   NOTE In Outlook 2003/2010, the workpackage list is displayed automatically in the Outlook calendar and task list, as soon as you have been added as a resource to the respective workpackage.

2. Select the **workpackage** on the workpackage list that is supposed to be synchronized.
3. Select **Synchronize (With Outlook Task, With Outlook Calendar)**.
   A new Outlook element will be created in the Outlook task list or the Outlook calendar.

InLoox PM items in the Outlook task list / the Outlook calendar

The respective Outlook item now is synchronized with the InLoox PM planning. On the right side next to the project, you will find this InLoox PM information:

Element	**Description**

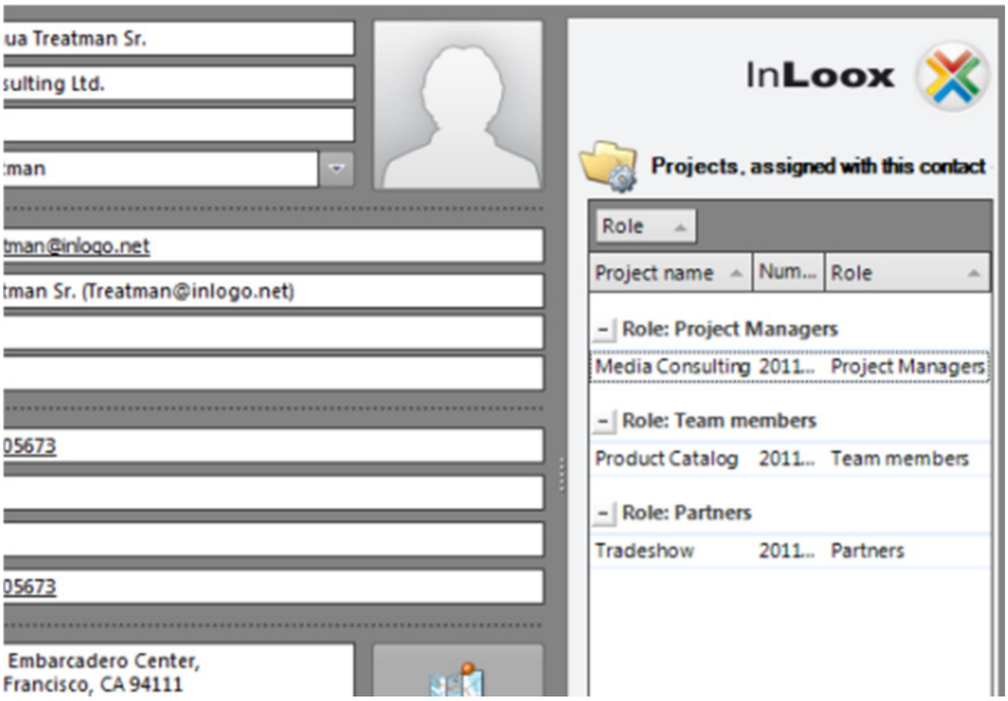
This Outlook element is linked to an InLoox PM planning element	Activate this check box if you want to keep the start and end date of this Outlook element synchronized with the start and end date of the InLoox PM planning element.
Project name	Name of related project.
Number	Number of related project.
Item name	Name of the InLoox PM planning element.
Start	Start of the InLoox PM planning element.
End	End of the InLoox PM planning element.
Description	Description of the InLoox PM planning element.
Resource	A team member that is assigned to this work package.
Work amount (h)	Workload of the resource.
Status	Shows you, whether the particular resource has completed his/her task.

NOTES

- Start and end date that have been changed from synchronized Outlook elements will be overwritten if the project plan is changed.
- The user no longer has to move a synchronized Outlook element.

Quick access panel for contacts

In InLoox PM, you can link Outlook contacts with the respective projects. So, you can see in the Outlook address book the role assumed by a certain contact - whether he or she is a project director, team member, customer or partner.



This is how you can use the quick access panel for contacts:

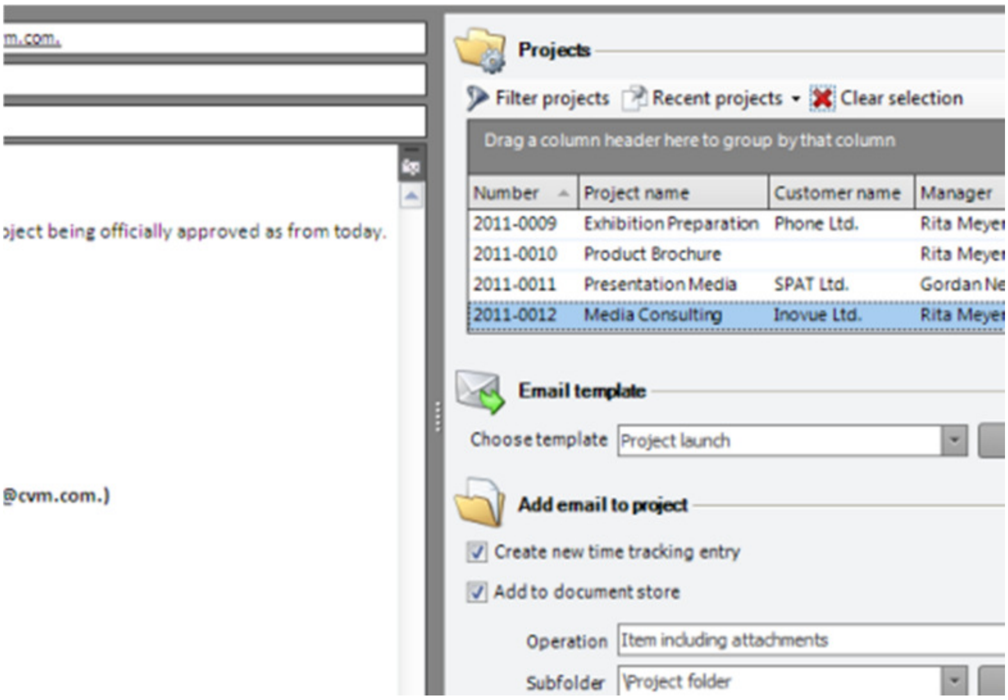
1. Open a contact from your **Outlook contact list**.
2. Now you see a list of all projects this contact is assigned to.

The standard grouping depends on the contact's role in the project.

TIP For a detailed description of the InLoox PM items on the quick access panel, see Quick access panels for tasks and calendar, in the InLoox PM items in the Outlook task list / the Outlook calendar section.

Quick access panel for E-mails

InLoox PM provides you with rapid and comfortable assignment of e-mails to the project document storage. If you have already added the e-mail, you see its link.



Please follow these steps to record existing and new emails.

1. Open an email from your personal Outlook inbox (or any other folder) by double-clicking it.
2. Select a project from the quick access panel on the right side next to the email.

   TIPS

   - Use the **filter** to search for the project. For more information, see Search and find projects.
   - Use the **Recent projects** button. The drop-down list displays projects you opened recently organized by numbers.
   - Click **Clear selection** , if you want to remove the selection.
3. In the **Add Document to Project** area you can choose from the following actions:
   - Activate the **Create new time tracking entry** check box in order to add a new time tracking entry to the project. Time tracking entries are the records of time spent for a project, e.g. for work carried out.

TIP By clicking **OK**, the **New Item** dialog box will be displayed. Fill out this dialog box with the required information. For more information, see Create and edit a time tracking item.

- Activate the **Add to document store** control box. With this option, you can assign any email attachments (files) to a project.
  1. In the **Operation** drop-down list, choose between **Item including attachments**, **Item without attachments**, **Only attachments** and **Item and attachments separately**.

     TIP For more information about management methods, see Add Outlook elements to InLoox PM, in the Management methods area.
  2. In the **Subfolder** drop-down list, choose a subfolder. You can also create a new one by clicking **New...**.
     1. In the **Create a New Subfolder** dialog box select the directory in which you want to create a new folder.
     2. Click **Create New Folder** and enter a new name.
     3. Click **OK**.
  3. In the **Status** field enter instructions, e.g. complete or awaiting release.
  4. Click **Links** to link the Outlook element with project elements. Click **Add** and then **OK**.

     InLoox PM displays a document as a paper clip on the page you have chosen. You can also open the document directly from this page.

4. Click **OK**.

Customize email templates

With email templates, you can insert pre-defined and project-based information text snippets into a new email. Email templates can be added or modified in the InLoox PM options.

Article content

Work with E-mail templates

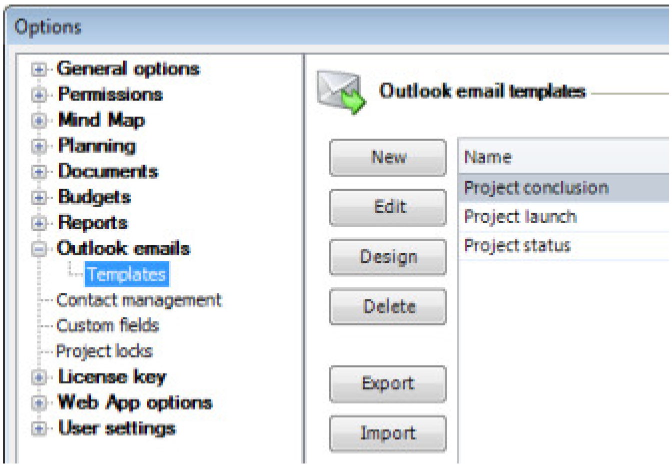
This is how you can use the email template feature in new emails:

1. Open a **new email**.
2. Select a **project** in the quick access panel.
3. Select an **email template**.
4. Add the selected template by clicking **Insert**.
5. The text template will be added to your email and the project manager of the selected project will be inserted to the email recipients.

Manage E-mail templates

You can create, rename or delete email templates in the **InLoox PM options**.

1. Open the dialog box **InLoox PM Options**.
   TIP For more information about how to open the InLoox PM options, please see Open the InLoox PM options.
2. Under **Outlook emails** click **Templates**. On the right side you will see the **Outlook email templates** area.



3. You can choose from the following actions:
   - Add a new template by clicking **New**. On the **New** dialog box, please follow these steps:
     1. Enter a name in the **Template name** field.
     2. Define the Outlook email field rules such as **Recipient**, **CC Recipient**, **BCC Recipient** and **Subject**. Click the **Arrow** and choose from the drop-down list the field you want, e.g. <PROJECT_MANAGER_0>.
     3. Click **OK**.
   - Change the saved template by clicking **Edit**. In the **Edit** dialog box, you can make your changes (see the first point).
   - Customize the template content for a report with the InLoox PM email designer. Choose a template from the list and click **Design**.
     TIP For instructions on how to work with the InLoox PM report designer, see Work with the report designer and the help documentation of the designer.
   - Remove a template permanently from InLoox PM. Choose a template from the list and click **Delete**.
   - Load a template from your local data. Click **Import** and choose a template in the **Open Email Template** dialog box, then click **Open**.
   - Save a template in your local data if you want to send it to other users. Click **Export** and choose a storage location in the **Save Email Template** dialog box, where you want to save it. Click **Save**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

Add Outlook elements to InLoox PM

Save files, links and Outlook elements with InLoox PM and organize them in the corresponding project folder

Emails, which include attachments, can be assigned directly to the project. InLoox PM offers a proper feature, which is always available from any part of Outlook.

NOTES

- The following standard elements can be posted directly to an InLoox PM project: emails, contacts, tasks, journal entries and calendar entries.
- Non-standard message types are **not** supported by InLoox PM.

Article content

Manage an attachment

Management methods

Manage an attachment

1. Choose an Outlook element, e.g. an email from your Outlook inbox.
2. On the **Outlook Ribbon**, in the **Start** tab, in the **InLoox PM** group, click **Add to Project**.
   NOTE In Outlook 2003/2007, click **Add to Project** in the **InLoox PM Toolbar**.
3. In the **Add to Project** dialog box do the following:
   1. Choose a project from the project list, to which you want to add the element.

      TIPS

      - Use the **filter** to search for the project. For more information, see Search and find projects.
      - Use the **Recent projects** button. The drop-down list displays projects you opened recently organized by numbers.
      - Click **Clear selection**, if you want to change the choice.
   2. In the **Add Outlook element to project** area, do the following:
      - Activate the **Create new time tracking entry** check box in order to add a new time tracking entry to the project. Time tracking entries are the records of time spent for a project, e.g. for work carried out.

        TIP By clicking **OK**, the **New Item** dialog box will be displayed. Fill out this dialog box with the required information. For more information, see Create and edit a time tracking item.

      - Activate the **Add to document store** check box. With this option, you can assign any email attachments (files) to a project.
        1. In the **Operation** drop-down list, choose between **Item including attachments**, **Item without attachments**, **Only attachments** and **Item and attachments separately**.

           TIP Below, you find the description of all these operations in the **Management methods** area.

2. In the **Subfolder** drop-down list, choose a subfolder. You can also create a new one by clicking **New...**.
    1. In the **Create a New Subfolder** dialog box, select the directory in which you want to create a new folder.
    2. Click **Create New Folder**.
    3. Click **OK**.

    TIP For more information on how to create a subfolder, see Create a subfolder.

3. In the **Status** field enter instructions, e.g. complete or awaiting release.
4. In the **Notes** field enter comments and remarks to the document. Optionally, you can also format these comments. Use features such as cut, copy and paste, undo and redo, font, font size, font style (bold, italic, strikethrough, subscript, superscript and underline), font color, and text highlighting. You can also select the font size, increase or decrease the size by one increment, and change the case.
5. Click **Links** to link the Outlook element with a project element. Click **Add** and then **OK**.
InLoox PM displays a document as a paper clip on the page you have chosen. You can also open the document directly from this page.

3. Click **OK**.
InLoox PM saves the Outlook element as a document on the **Documents** project page.

NOTE The context menu contains several options to adjust the project list view. Right-click in the project list to open the context menu.

- **Expand or reduce the project list view** Change the view by using **Expand All** or **Collapse All** to make the project list clear.
- **Choose Fields** This feature sorts and organizes the project by important data.
    - On the **Choose Fields** dialog box, click one field, e.g. **Budget critical**, and drag it into the headlines.
    - Reset the fields via Drag and Drop back into the dialog box.

Management methods

When you insert an Outlook element with attachment into an InLoox PM project, there are various options to handle a attachment.

Method	**Action**	**Pros & cons**
Element with attachment	InLoox PM 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 PM.
Attachment only	InLoox PM 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 PM.
Element and attachment separately	InLoox PM 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.

Customize and configure

Change the language

InLoox PM 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 PM at any time without the need to restart.

Please follow these steps to change the operating language:

Article content

Outlook 2010 View

- Click the **File** tab.
- Click **InLoox PM**.
- Click **Change language**.
- Select a language, e.g. **German**, **English**, **French**, **Italian**, **Spanish** or **Russian** from the list.

InLoox PM changes the language of all dialog boxes and screens.

Outlook 2003/2007 View

Please follow these steps to change the operating language:

1. Click **Tools** in the InLoox PM Toolbar.
2. Click **Language**.
3. Select a language, e.g. **German**, **English**, **French**, **Italian**, **Spanish** and **Russian** from the drop-down list.

InLoox PM changes the language of all dialog boxes and screens.

Generate personalized views

Organize, sort, and group projects - e.g. by assigned responsibilities, deadlines, project type, priority, etc. You can save the created project list view and open it again as soon as you use the project list again.

Article content

Standard views included in InLoox PM

Use the standard views provided by InLoox PM. These views help you to display data in a flexible way.

Name	**Appearance/Filter/Grouping**	**Purpose**
Active projects	Filter; all non-completed projects	To show all active projects, for example to create turnover lists or to support customers.
Inactive projects	Filter; all completed projects	To inspect archived project records.
Projects by category	Grouping; all projects grouped by the field **Category**	To help to maintain an overview as projects multiply.
Projects by status	Grouping; all projects grouped by the field **Status**	To display an internal procedure.
Projects by project manager	Grouping; all projects grouped by the field **Project Manager**	To display internal responsibilities and allocated projects.
Projects by customer	Grouping; all projects grouped by the field **Customer**	To display 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 the type **Calculation**	To determine turnover potential and follow up on offers.

Generate a personalized view

InLoox PM enables you to save personalized views. Please follow these steps:

1. On the Outlook Ribbon, on the **Start** tab, in the **InLoox PM** group click **Projects**.
   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.
2. Now you can change the view directly in the project list.
   TIP For more information on how to do this, see Customize a view in this article.
3. On the **InLoox PM** tab, in the **Views** group click **More Views** and then **Save current view as**.
   NOTE In Outlook 2003/2007, click **Actual Views** in the **InLoox PM Toolbar**.
   1. In the **Save View** dialog box, enter a view name.
   2. Activate the **Visible for all users** check box, if you want to share this view with other authorized users.
   3. Click **OK**.
      The new view is now displayed in the drop-down list **More Views**.

Use and manage personalized views

This is how you can use a personalized view:

1. On the Outlook Ribbon click **InLoox PM** tab.
2. In the **Views** group, click **More Views**.
   NOTE In Outlook 2003/2007, click **Actual Views** in the **InLoox PM Toolbar**.
3. Select a view from the drop-down list, e.g. **Project controlling**.
   InLoox PM loads the saved view with customized data in the project list.

Proceed as follows in order to manage views:

1. On the Outlook Ribbon click **InLoox PM** tab.
2. In the **Views** group, click **More Views**.
3. NOTE In Outlook 2003/2007, click **Actual Views** in the **InLoox PM Toolbar**.
4. Click **Manage Views...** in the drop-down list.
5. In the Views dialog box do one or more of the following:
   - **Edit view** double-click the view you want ot edit or click **Edit**.
   - **Remove view** Remove permanently one view from InLoox PM. Choose a view from the list and click **Delete**.
   - **Reset views** Click **Reset views**, if you do not want alle changes to be accepted.
   - **Export view** Save a view in your local documents. Choose one view from the list and click **Export**.
   - **Load view** Load a view from your local data. Click **Import** and choose a view file in the **Import File** dialog box, then click **Open**.
   - **Download view** Click **Download** to download an exisiting view template from the InLoox website.

Customize a view

In the Outlook Ribbon, on the **Start** tab, in the **InLoox PM** group, click **Projects** to open the project list. Now you can customize the project list view with the following possibilities.

NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** to open the project list.

- **Sort the information in the project list** Click on a column by which the project list is supposed to be sorted.

The project list will be displayed according to your choice. Click ▲ in the column to sort in rising or in descending order by clicking ▼.

- **Group the projects according to the selected criterion** Click on a column, e.g. **Status**, by which the project list is supposed to be grouped.
    - Drag a column into the area above the column headers.
      The project list will be grouped by the selected criterion. Reset the grouping via Drag and Drop into the project list.
- **Add more information to the project list** Use the **Choose fields** feature to organize the project list by selected information.
    - Right-click on the project list to open the context menu.
    - Click **Choose fields** in the context menu.
    - On the **Choose fields** dialog box, click the field you want to add and drag it into the column headers.

      NOTE Reset the fields via Drag and Drop into the project list.
- **Define individual fields** You can implement the workflows for all users with this feature. 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.

  TIP For more information see Search and find projects.

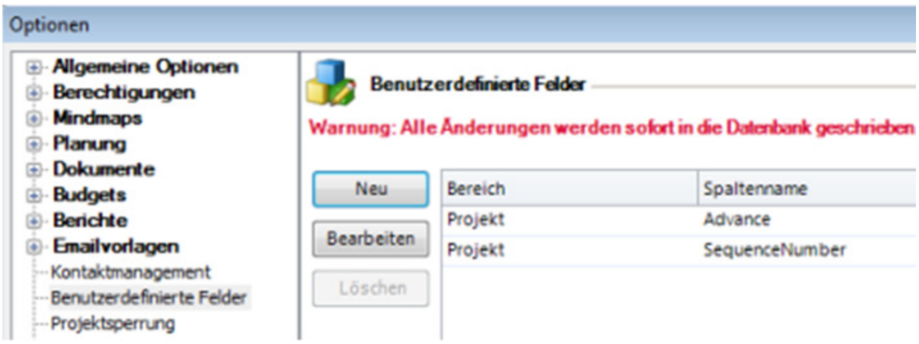
Create custom fields

Custom fields enable you to expand the data model of InLoox PM to suit your own requirements. New fields can be created for the entire project or for one page of it: mind maps, planning, time tracking, documents or budgets. Field names are freely definable. InLoox PM supports several data types in custom fields. Please follow these steps to create a new custom field:

1. Open the dialog box **InLoox PM Options**.

   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.

2. Click **Custom fields**. On the right side you see the **Custom fields** section.



3. Please select one of the following actions:
    - Create a new custom field by clicking **New**.
        1. On the **New Custom Field** dialog box, in the **Name** field, type a name for the custom field that you want to create.
        2. Select the intended location from the **Location** drop-down list of the field (i.e. the list in which it is supposed to be displayed).
        3. Select a **Type** from the list. 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.
    4. Optionally, you can define a default value by selecting **Edit default...** from the drop-down list.
        1. In the **Edit Text** dialog box type a default value.
        2. The field type **List** also allows you 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**).
    5. Click **OK**.
  - You can edit an existing custom field by selecting it and clicking **Edit**. You can only modify default values.
  - If you want to remove an existing custom field, select it from the list and click **Delete**.
4. Click **OK** or **Apply** to save the changes.

IMPORTANT When a custom field is deleted, all contents of it in all projects are permanently removed from InLoox PM.

NOTE Each created custom field will have its own box on the selected project site. Enter the value in this box.

Customize the InLoox PM language files

InLoox PM uses so-called resource files for all texts and messages that are displayed. These are located in the program folder on the InLoox PM client. If you want to adapt the displayed texts and messages to the requirements of your company you have to modify them in the resource files. You can find them in the program folder on the InLoox PM client.

IMPORTANT

List of the language files (delivery staus)

File name	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

Please follow these steps to customize the InLoox PM resource files:

1. Close Outlook on the client concerned.
2. Open the relevant language file with the **InLoox PM Resource Editor**. This tool can be found in the Download area of the InLoox PM website.

3. Make the required changes to the file and save it.
4. Test the changes on the InLoox PM user interface.
5. Distribute the file among other InLoox PM clients as required.

Generate and edit groups

In the InLoox PM Options, you can define groups that are available in every InLoox PM projects on the project pages Planning, Time Tracking, Budgets and Budget Overview. The groups help you to structure the data in a more meaningful way and allow an ongoing automatic comparison between time tracking entries, planning elements and budget positions. They can also also carry a currency code.

IMPORTANT Please note the possible effects when changing settings. These are described in this chapter.

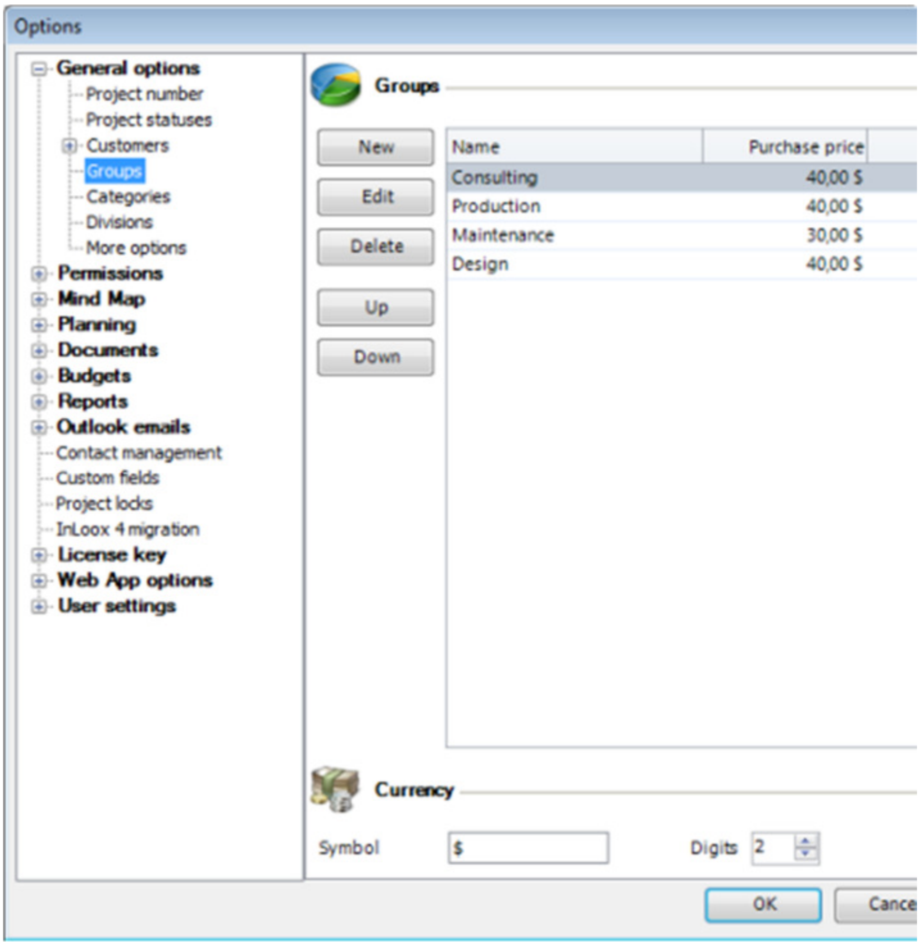
NOTE In this program section, you are also able to define purchase and selling prices. These are used on the Budget page, for example to prepare time tracking entries recorded on the Time Tracking page for billing.

To manage groups, do the following:

1. Open the **InLoox PM Options**.

   TIP For more information on how to open the InLoox PM options, see Open the InLoox PM options.

2. Under **General options** click **Groups**. On the right side you will see the **Groups** area.



3. Do one of the following:
   - Create a new group by clicking **New**.
     - In the **New Group** dialog box, in the **Name** field type a group name.
     - In the **Purchase price** and **Disposition price** fields, enter the prices you want.
     - Click **OK**.
   - The existing groups are displayed in the **Groups** list according to the order in which they appear in the InLoox PM projects. Double-click the entry that you want to change or click **Edit**.
   - Select a group you want to remove from the list and click **Delete**.
   - You can change the groups order by clicking **Up** and **Down**. The selected group will be moved one position upwards or downwards.
   - In the **Currency** area, in the **Symbol** field, type a currency symbol, which is supposed to be used for amounts of money system-wide, e.g. **€**, **$** or **CHF.**
   - In the **Digits** field, type the number of digits (fractional digits) that is supposed to be used system-wide.
4. Click **OK** or **Apply** to save the changes.

WARNING **Effects** of changing or deleting groups:

- **Adding** and **renaming** groups has no effect on existing projects.

- When group prices are changed, the old amounts remain initially unchanged in all projects. The amounts are updated when the relevant planning element, time tracking entry or budget position is **next edited**.
- The **deletion** of groups has a **permanent** effect, namely that
    - the group and associated amounts are no longer displayed in the budget overview.
    - to all planning elements, time tracking entries and budget positions using the deleted groups must be assigned a new group **when next edited**.

Effects of changing the currency symbol

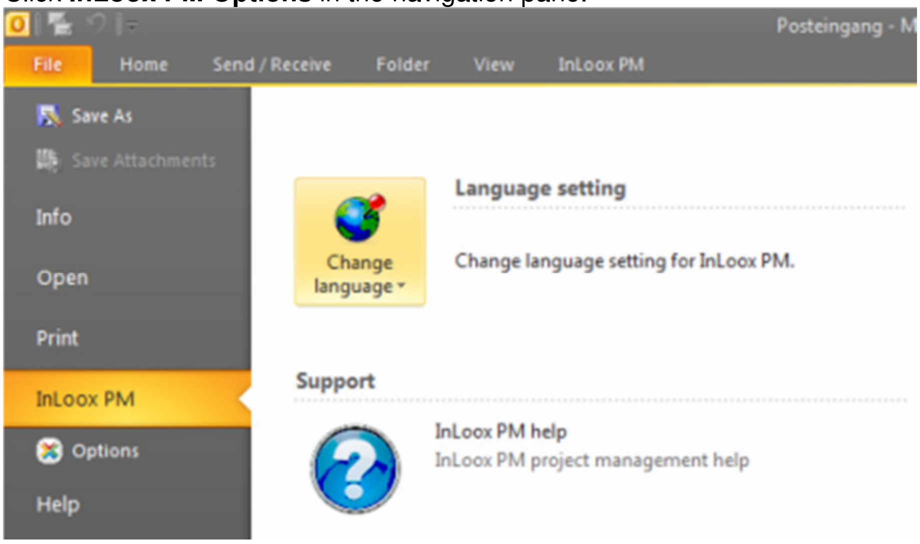
- The currency is not automatically redenominated. If, for example, **€** is replaced by **$**, InLoox PM does not recalculate the amounts, but simply changes the currency symbol as if the rate of exchange were 1:1.

Open the InLoox PM options

In the InLoox PM options, you can make changes to the basic parameters and you can set up permissions in InLoox PM.

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

1. Click the **File** tab.
2. Click **InLoox PM Options** in the navigation pane.



TIP Users require administrator permissions to change global settings. For more information, see Set up permissions. User settings can be changed by any user.

Open the InLoox PM options in Outlook 2003/2007

In the InLoox PM options you can make changes to the basic parameters and you can set up permissions in InLoox PM.

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

1. Click **Tools** in the **InLoox PM Toolbar**.
2. Click **Options** in the drop-down list.

TIP Users require administrator permissions to change global settings. For more information see Set up permissions. User settings can be changed by any user.

Work offline with InLoox PM

With **InLoox PM Workgroup Server** and **Enterprise Server**, users work directly on a database server. You can, however, configure individual workstations to use InLoox PM when it is disconnected from the network. When reconnecting with the company network, an automatic synchronization is carried out.

IMPORTANT Not all database systems support offline availability or replication. InLoox PM offers the data structures that are needed for synchronization and replication, but uses the synchronization features of the database system. In certain circumstances, you might need to change the database system or the related software to take advantage of offline availability. Check the documentation of your database system regarding offline availability and replication.

TIP You find step-by-step guides about InLoox PM configuration for offline availability in the Download section of the InLoox website.

In case of problems, please contact our installation support. For the contact information see Request support for the InLoox PM installation.

Install InLoox PM

Install InLoox PM

IMPORTANT Please note that Outlook must already be installed and fully operational before you can install InLoox PM. The installation usually takes no longer than five minutes per client. The server installation (only required for **InLoox PM Workgroup Server** and **Enterprise Server**) can be performed directly from the client.

In the Whitepapers of the InLoox PM Website, you find step-by-step guides for the InLoox PM installation:

- or **InLoox PM Personal**
- for **InLoox PM Workgroup Server**
- for **InLoox PM Enterprise Server**.

The Download section also contains an **MSI package** for the deployment via software distribution to multiple clients.

TIP In our Support center you will find assistance in solving installation problems. In case of problems, you can also contact our installation support. For more information, please see Request support for the InLoox PM installation.

Request support for the InLoox PM installation

Outlook is a complex software product. Difficulties in connection with the installation of InLoox PM 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 PM and not with general Outlook problems.

Please follow the link to find all of our contact details.

Security and privacy

Set up permissions

In InLoox PM, you can configure finely structured and freely definable permissions. So, you can clearly define responsibilities and make sure that only authorized users gain access to sensitive data.

You can set permissions in InLoox PM Workgroup and Enterprise Server in the InLoox PM options.

NOTE InLoox PM is delivered without permissions being set. So, every user can see and change all permissions. This might be a security risk.

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Overview of role and account-based security architecture

In InLoox PM, you can select role-based and user-based permissions.

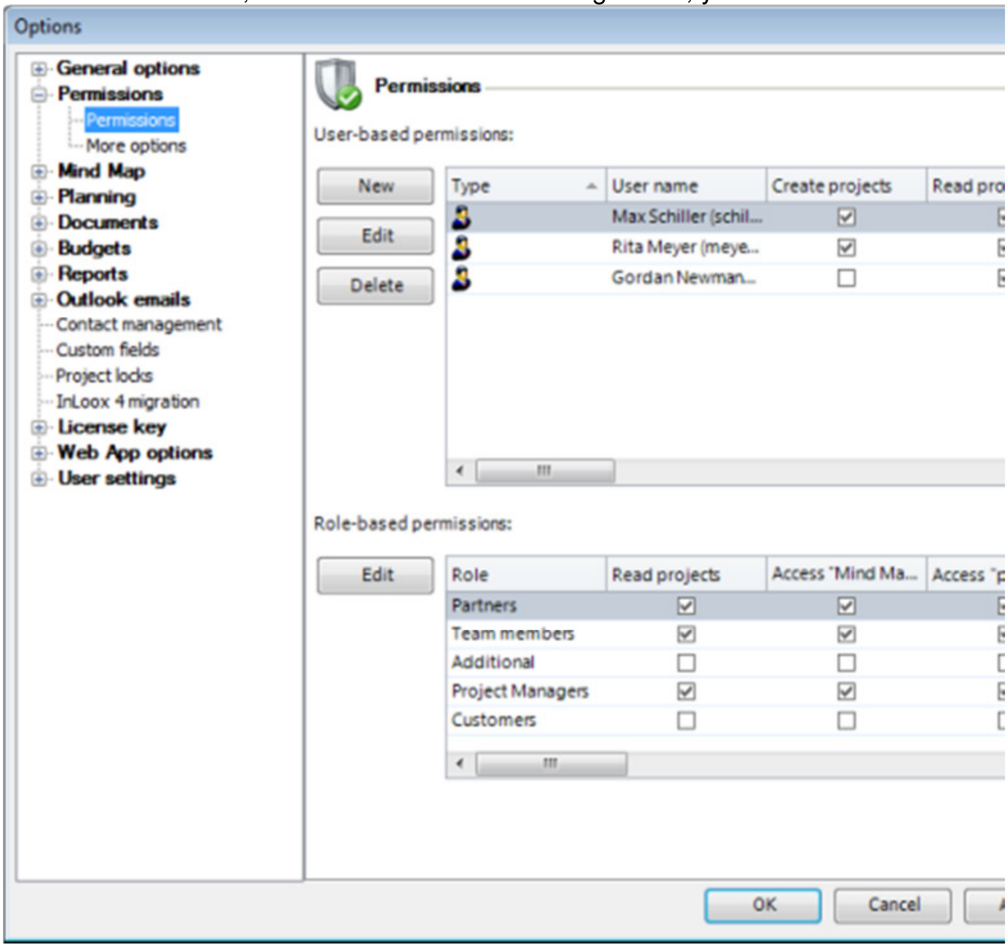
Role permissions are defined according to the function carried out by each person involved in the project, be it as project manager, team member, customer, partner or any other activity. InLoox PM then assigns the correct permission to each person assuming a given role.

IMPORTANT User account oriented permissions apply to all projects. This allows, for example, company management to look at all current and concluded projects, whereas practical responsibility remains in the hands of the project manager and team.

User account oriented permissions require a Windows Server with Active Directory or InLoox PM contacts. Role permissions additionally require Exchange Server.

To open the permissions please follow these steps:

1. Open the dialog box **InLoox PM Options**.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Under **Permissions**, click **Permissions**. On the right side, you see the **Permissions** section.



Permission Mode	Remarks
User-based permissions	• Permissions based on Windows and InLoox user accounts. Active directory accounts (in domain mode) and local Windows and InLoox user accounts (in workgroup mode) are supported. • Apply across all projects and on the entire database. NOTE InLoox PM does not support Windows groups at this time.
Role-based permissions	• Users acquire permissions by assuming a role in a project. Project members are all persons who are listed in the project on the Management page as "In Charge". • Possible roles: Project manager, Team member, Customer, Partner, Other. • Microsoft Exchange Server or InLoox contacts are required. NOTE Persons are identified by their Windows or InLoox Security Identifier, or SID, and the Windows X400 address, or Exchange address. Persons with the

	same X400 address have the same role-based permissions in InLoox PM. If this is not what you want, please deactivate the role-based permissions entirely by removing all permissions for all roles.
Examples	InLoox PM 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 "Gordon Newman" is authorized to "edit projects " and "edit budgets". TIP For more information about permissions, see List of permissions. • "Gordon Newman" is part of the "team" in the project "Product Development" • There are three other projects in which "Gordon Newman" is not involved and therefore does **not** have the role "team" Consequently, these permissions apply to Gordon Newman: • He may read and edit the project "Product Development". He may also read and edit budgets in this project. Gordon Newman has these permissions in all projects in which he is in the team role. • "Gordon Newman" 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, Gordon Newman has no permissions for any other projects. The following permissions apply 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 "Gordon Newman". • Persons who are team members in other projects than "Product Development" can see, in contrast to Gordon Newman, a number of projects, but may not edit any of them. InLoox PM permissions are very 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. TIP Our contact information can be found under Contact on the InLoox web site.

Set user-based permissions

Set user-based permissions:

- **Set permissions for a user** In the **User-based permissions** section, click **New**.
  1. In the Permissions dialog box, click the **Arrow** to select the user.
  2. Choose from the drop-down list between **Active Directory user**, **Exchange user** or **InLoox PM user**.
     - **Active Directory user**

- In the **Select User** dialog box, click **Object Types**.
  NOTE You can also use this button to open the **Select User** dialog box.
- In the **From this Location** box, click **Locations** and select **Entire Network**. Click **OK**.
- Type the required user name into the **Enter the object name to select** field.
- Click **Check name**. A user name that has been recognized by Windows is shown underlined.
- Click **Advanced...**, if you need to search for a user name.
- Click **OK**.

- **Exchange user**

  In the **Select Contact** dialog box, select an address book and then the respective name from the list. Click **OK**.

  TIP In the **Select Contact** dialog box, use the feature **Search by Skill**. For more information, see Assign skills to resources.

- **InLoox PM user**
  In the **Select Contact** dialog box, select an InLoox PM address book and then the respective name from the list. Click **OK**.

  TIP For more information on how to create an InLoox PM account, see Create an InLoox PM account.

3. Select the permissions for the respective user from the **Permissions** list.
   TIP For more information about permissions, see List of permissions.
4. Click **OK**.

- **Edit user permissions** Choose one user from the list and click **Edit**. Click **OK** after you have made all changes you want.
- **Remove user permissions** Choose one user from the list and click **Delete**.

Set role-based permissions

Please follow these steps to set role-based permissions:

NOTE Role-based permissions are only active if there is at least one user-based administrator permission.

1. In the **Options** dialog box, in the **Role-based permissions** section, click **Edit** to change the selected role-based permission.
2. Select the permissions for the role from the **Permissions** list.
   TIP For more information about permissions, see List of permissions.
3. Click **OK**.

List of permissions

The following permissions apply to **InLoox PM Workgroup Server** and **Enterprise Server**. Permissions for the actions listed can be assigned to users or roles.

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 PM project list. • 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. TIP For more information about mind maps, see the category Mind maps.	Prerequisite: Read projects
Access planning	Right to read all planning elements of a project. TIP For more information about planning, see the category Planning.	Prerequisite: Read projects
Access time tracking	Right to read all time tracking entries of a project TIP For more information about time tracking, see the category Time tracking.	Prerequisite: Read projects
Access own time tracking entries	Right to read all own time tracking entries of a project. TIP For more information about time tracking entries, see Create and edit a time tracking item.	Prerequisite: Read projects
Access documents	Right to open and read all documents of a project. TIP For more information about documents, see the category Documents.	Prerequisite: Read projects
Access budgets	Right to read all budgets, budget positions and the budget overview of a project. TIP For more information about budgets and budget positions, see the category Budgets.	Prerequisite: Read projects
Edit projects	Project can be changed. This right is a prerequisite for all actions which allow users or roles to modify data.	Prerequisite: Read projects
Edit management	Right to change the project master data on the Management page. TIP For more information about the Management page, see the category Management (except project contacts).	Prerequisite: Edit projects
Edit project contacts	Project contacts can be added, changed or deleted. It allows the user to control the roles of persons in a project. TIP For more information, see the category Management.	Prerequisites: • Edit projects • Edit Management

Add project notes	Allows you to create and change project comments on the Management page. TIP For more information on project comments please see Create and change comments.	Prerequisites: • Edit projects • Edit Management
Delete project notes	Permission to remove your own project comments and other users' comments on the Management page.	Prerequisites: • Edit projects • Edit Management
Delete own project notes	Allows you to remove your own project comments on the Management page, but not to remove other users' project comments.	Prerequisites: • Edit projects • Edit Management
Lock projects	Project can be locked for other users. Users without the respective permission may not edit locked projects and cannot remove the lock. TIP For more information on how to lock a project, see Add other project information.	Prerequisites: • Edit projects • Edit Management
Edit mind maps	Allows adding, changing and deletion of all mind maps of a project. TIP For more information about mind maps, see the category Mind maps.	Prerequisite: Edit projects
Edit Planning	Allows adding, changing and deletion of all planning elements of a project. TIP For more information about planning, see the category Planning.	Prerequisite: Edit projects
Edit time tracking	Allows adding, changing and deletion of *all* time tracking entries of a project. TIP For more information about time tracking, see the category Time tracking.	Prerequisite: Edit projects
Edit own time tracking entries	Allows adding, changing and deletion of *own* time tracking entries of a project. TIP For more information about a time tracking entry, see Create and edit a time tracking item.	Prerequisite: Edit projects
Edit time tracking without time limit	Allows adding, changing and deletion of **past** time tracking entries of a project. TIP For more information about time tracking, see the category Time tracking.	Prerequisite: Edit projects
Edit documents	Allows adding, changing and deletion of all documents in the document list of a project.	Prerequisite: Edit projects

	TIP For more information about documents, see the category Documents.	
Edit budgets	Allows adding, changing and deletion of all budgets and budget assets of a project. TIP For more information about budgets and budget positions, see the category Budgets.	Prerequisite: Edit projects
Delete projects	Delete a project.	None
Create address books	User has the right to create new address book. TIP For more information see Add, manage or delete an address book.	None
Read address books	Access all address books.	None
Edit address books	Allows modifying address books.	Prerequisite: Read address books
Delete address books	Address books can be removed.	Prerequisite: Read address book
Read own address books	Access own address books	Prerequisite: Create adderss books
Edit own address books	Right to change own address books	Prerequisites: • Create address books • Read own address books
Delete own address books	Allows to remove own address books and other users' address books.	Prerequisites: • Create address books • Read own address books
Use existing reports	All reports can be used. The InLoox PM report generator filters the data for which the user does not have permission out of the report (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. TIP For more information see Manage the 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 PM Ribbon (in Outlook 2003/2007 InLoox PM Toolbar) and Options: • **Edit planning templates** Right to rename and delete InLoox PM planning templates. • **Edit budget assets** Right to create, change and delete InLoox PM budget assets.	O

	• **Edit budget state** Right to create, change and delete InLoox PM budget states. • **Edit notifications** Right to change Notification templates. • **Edit categories** Right to create, change and delete InLoox PM 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 PM license keys. • **Options** Right to change the InLoox PM options. Incorporates the right to change permissions.	

Create an InLoox PM account

To logon to the InLoox PM project management platform you can use Windows or InLoox PM Authentication. With an InLoox PM Authentication, external team members, project partners or stakeholder without their own Windows user account in the corporate network are able to log into InLoox PM directly with user name and password.

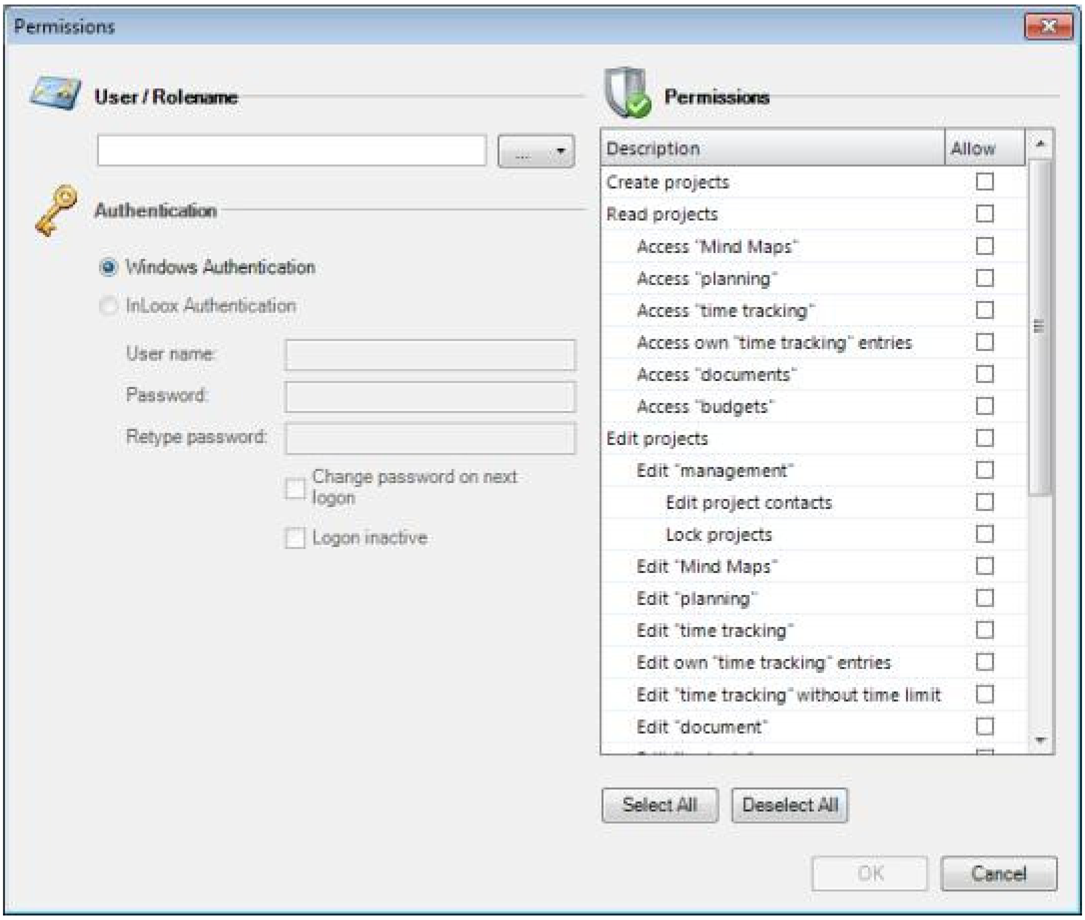
IMPORTANT Only users with administrative permissions can create an InLoox PM account.

Article content

InLoox PM authentication

Please follow these steps to create an InLoox PM account:

1. Activate first the **InLoox PM contact management**.
   TIP For more information, see Activate the contact management.
2. Create a new contact in the **InLoox PM Contacts**.
   TIP For more information, see Add a contact.
3. Open the **InLoox PM Options** dialog box.
   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
4. Under **Permissions** click **Permissions**.
5. In the **User-based permissions** section, click **New**.



6. In the **Permissions** dialog box, please follow these steps:
    1. Click the **Arrow** and choose from the drop-down list **InLoox PM user**.
    2. In the **Select Contact** dialog box, select **InLoox PM address book** from the drop-down list **Address book**. Choose a name from the list and click **OK**.
       The contact name is now displayed in the **User name box**, in the **Authentication** section, under **InLoox PM Authentication**.
    3. You can change the name in the **User name** field.
    4. In the **Password** field, type a new password for the InLoox PM authentication.
    5. Enter this password again in the **Retype password** box to confirm it.
    6. Activate one of the following check boxes:
        - Activate the **Change the password on the next logon** check box to allow the InLoox PM user to change his or her password. See Change InLoox PM password below.
        - Activate the **Logon inactive** check box to deactivate the authentication.
    7. Select the permissions from the **Permissions** list for the InLoox PM user.
    8. Click **OK**.
7. Click **OK** or **Apply** to save the changes.

   TIP Now, the InLoox PM user can logon to InLoox PM. For more information see Log on as InLoox PM user.

Change the InLoox PM password

Please follow these steps to change the InLoox PM password

1. Open the **InLoox PM Options**.
   TIP For more information on how to open the InLoox PM options, see Open the InLoox PM options.
2. Under **User settings** click **User Login**.
3. In the **User Login** section, choose **InLoox PM Authentication** and click the **Change Password** button.
   You can also change your user name in the **User name** field.
4. In the **InLoox PM Authentication** dialog box, type your current password in the **Current password** field.
5. Type the new password in the **Password** field.
6. Type the new password again in the **Retype new password** field.
7. Click **OK**.
   Now, you can use your new password for the InLoox PM Authentication.
   TIP For more information on how to log on, see Log on as InLoox PM user.

Log on as InLoox PM user

Choose between Windows Authentication and InLoox PM Authentication to logon to InLoox PM.

TIP Create an InLoox PM account to be able to logon as InLoox PM user. For more information see Create an InLoox PM account.

1. On the **InLoox PM** tab, in the **Extras** group, click **Log on as**.

   NOTE In Outlook 2003/2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Log on as**.

2. On the **InLoox PM Authentication** dialog box choose **InLoox PM Authentication**.

3. Type your user name for the InLoox PM authentication in the **User name** field.
4. Type your password in the **Password** field.
5. Activate the **Always use this credentials** check box, if you want to save your authentication data in the system.
6. Click **OK**.

TIP As an InLoox PM User, you can change your password anytime. See Create an InLoox PM account in the Change the InLoox PM password section.

Select a suitable system for data storage

As of version InLoox 6, the InLoox PM data storage has been redesigned to support data storage in SQL databases (SQL = "Standard Query Language") to provide an effective permission system and to improve response times.

The following systems are used by the different InLoox PM editions:

InLoox PM 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 PM installation folder.
Workgroup Server and Enterprise Server	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)

Back up project data

To back up all of your InLoox PM data you can use the correspondent tool producer.

A regular data accortding to the InLoox PM editions backup is carried out as follows

InLoox PM edition	Procedure
Personal	It is sufficient to make regular copies of the InLoox PM files on CD-ROM or tape. The data file, which normally has the extension .SDF (SQL Server Compact Edition Database File), must not be opened in any program. The standard name of the file is InLoox.sdf. The file is stored in the InLoox PM installation folder.
Workgroup Server and Enterprise Server	Save the entire InLoox PM database on the server where it is published. You can use any software which supports the backup of databases during operation (scheme and data) and which is suitable for your database system. Unfortunately, it is quite difficult to backup offline copies (database replications) located on the users' 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 Documents stored in InLoox PM must be backed up separately. InLoox PM only saves links to these objects, a backup of the InLoox PM 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.

Lock a project / Clean up project locks

InLoox enables you to lock a project if you want to avoid further changes to a project. You can delete a project lock anytime. To be able to lock a project or to delete a project lock you have to have the permission to **Lock projects**.

Article content

Lock a project

Please follow these steps to lock a project:

1. Open an existing project or create a new one.
   TIP For more information on how to create a project see Create a project.
2. On the **Management** page, on the **Edit** tab, in the **Status** group, click **Lock project**.
3. On the **Start** tab in the **Actions** group click **Save and close**.

Clean up project locks

InLoox PM applies to projects in process 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 InLoox PM, proceed as follows:

IMPORTANT Please make sure that all users have saved and closed all of their InLoox PM projects before you start to clean up project locks.

1. Open the **InLoox PM options**.

   TIP For more information about how to open the InLoox PM options, please see Open the InLoox PM options.

2. Click **Project locks.**
3. In the **Project locks** section, click **Delete project locks**.
4. Confirm the safety query with **Yes.**
5. Click **OK** or **Apply** to save the changes.

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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 fulfilment 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.

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(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.

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(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.

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(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 unauthorised 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 fulfilment 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 fulfil 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.

(7) The conditions of this paragraph apply mutatis mutandis to component manufacturers of the Software.

§ 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 effect 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 unauthorised 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: 2013-05-24

InLoox PM license terms

At the time of the installation you have entered a valid license key.

TIP For more information about the installation, see Install InLoox PM.

The license key consists of five groups of six alphanumeric characters, each in the following format: 111111-222222-333333-444444-555555.

Your license key is valid as follows:

- for one version of InLoox PM (Personal 7.x/Workgroup 7.x/Enterprise 7.x)
- for a specific number of users and servers
- for an unlimited time

WARNING Apply the following restrictions:

- InLoox PM Personal **must not** be used **as a server**.
- When the **maximum number** of named users has been reached, InLoox PM will no longer function on any user on which it was last installed or started.
- The license manager on the terminal server counts the number of **active users** for whom InLoox PM has been licensed.

InLoox PM monitors the permissible number of users. The following message is displayed to indicate that there are too few licenses:

"The maximum number of users has been reached. It is not possible to use InLoox PM.
Please check the license key or ask your system administrator."

The following procedure makes initially sure that only those active users on which InLoox PM is currently installed are counted:

1. On the **Outlook Ribbon**, click the **File** tab.
2. Click **InLoox PM Options** in the navigation pane.
   NOTE In Outlook 2003/2007click **Extras** in the **InLoox PM Toolbar**, then click **Options**.
3. Under **License key**, click **License key**.
   IMPORTANT The **License key** in the options will only be displayed if you have administrator permissions.
4. On the **InLoox PM master licenses** area, choose a license key from the list and click **Delete**.
5. Click **OK** or **Apply**.

If the error message persists, InLoox PM must be removed from the excess clients or additional licenses have to be acquired. Please refer to your reseller or the producer for this. You will receive immediately a license key to license the required number of users for InLoox PM.