



# **The Project Management Software – for Outlook, Web and Smartphone**

InLoox 9.x Server Installation Guide

An InLoox Whitepaper

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

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## General Information

The current version of InLoox PM is fundamentally different from predecessor generations of the product. Numerous innovations were realized together with customers and partners.

Supported database management systems with network usage are:

- Microsoft SQL Server (all versions and editions of SQL server 2008, 2012 and 2014)
- Oracle (versions 12c, 11g, 10g, 9i, 8i, 8.0, including „personal“, „express“ and „x64“- editions)
- MySQL (versions 5.0)

The database schema of InLoox PM Workgroup/Enterprise Edition is ready for offline and clustering usage.

With MS SQL LocalDb a compact and efficient database is available for single place usage, which can be used free of charge.

InLoox PM is internationalized and is available in several different language versions. Region and language settings are supported for every user's individual location. Thus, the foundations for global usage are laid.

## System Requirements

### Server (only for InLoox PM Workgroup/Enterprise Edition)

The hard- and software requirements depend on the used database system. Please consult the product documentation of the respective manufacturer for valid requirements.

All manufacturers that are supported by InLoox PM offer a free database product:

- Microsoft SQL Server Express Edition
- Oracle Express Edition
- MySQL Community Edition

### InLoox Web App

The following system requirements are valid for the InLoox Web App:

- Windows Server 2008 or higher (Internet Information Services starting with 7.5 or higher)
- .Net Framework 4.5

### Outlook Client

Windows Vista or higher and Office 2010 or higher is required for installation. InLoox supports Windows Vista, Windows 8, Windows 10, Office 2010 (32Bit & 64Bit), Office 2013 (32Bit & 64Bit), Office 2016 (32 & 64 bit) as well as Terminal Server.

The system requirements depend on the used versions.

InLoox PM automatically installs Microsoft .NET Framework 4.5 as a prerequisite.

The initialization of the InLoox Outlook Client is explained in the whitepaper **InLoox PM 9.x Client Installation Guide**. You can find it at:

<https://www.inloox.com/support/knowledge-base/white-papers/>

## Upgrade / Migration of Existing Projects

### Upgrade from InLoox PM 8.x

Please create a backup of the current Database.

The database can be upgraded with the Server Installation Package

You can find a detailed guide at: <https://www.inloox.com/support/knowledge-base/white-papers/>

### Upgrade from older versions

A direct upgrade from older versions (InLoox PM 7.x and older) is not possible. You will you have to update the database to version 8.x first. You can find a detailed guide at:

<https://www.inloox.com/support/knowledge-base/white-papers/>

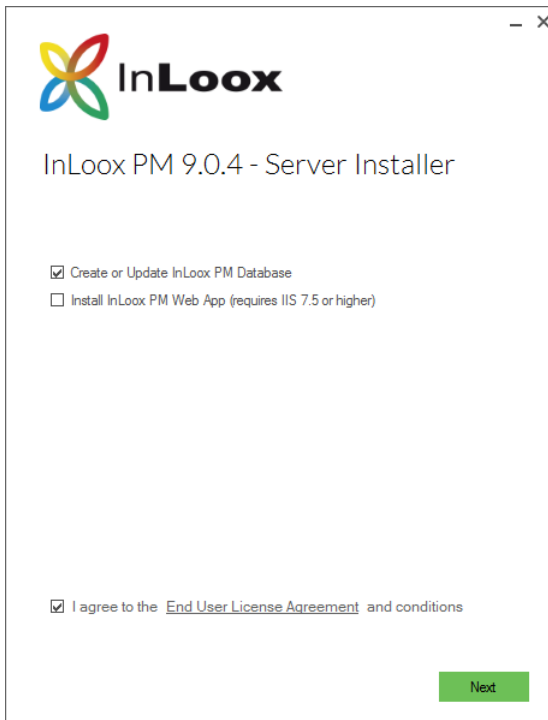
# Installation

## Publish InLoox PM Database.

**Important note:** Please install the database server in advance. See chapter **System requirements/Server**. All manufacturers that are supported by InLoox PM offer a free database product, which is ready to use within a few minutes.

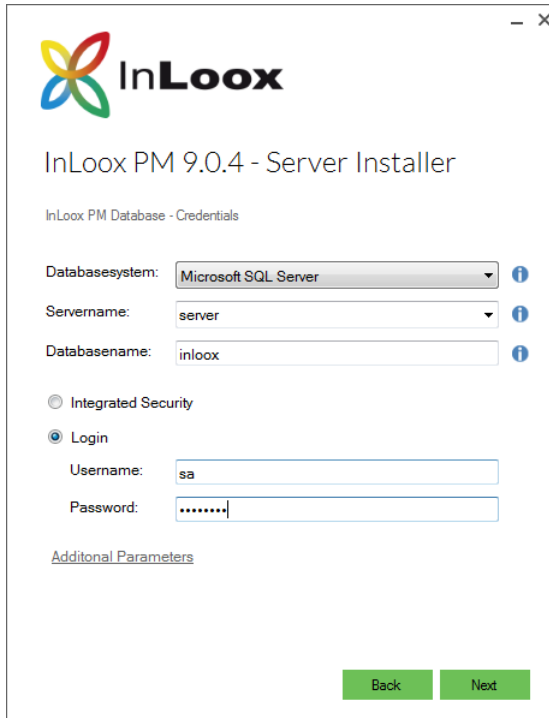
You do not have to create a database first. The InLoox setup will automatically create a new database with the required settings.

1. Run **InLoox\_PM\_WorkgroupEnterprise\_9XX.exe**



Select **Create or Update InLoox PM Database** and check **I agree to the End User License Agreement**, then click on **Next**.

2. Choose the **database type** you are using and enter the connection information. Confirm with a click on **Next**.

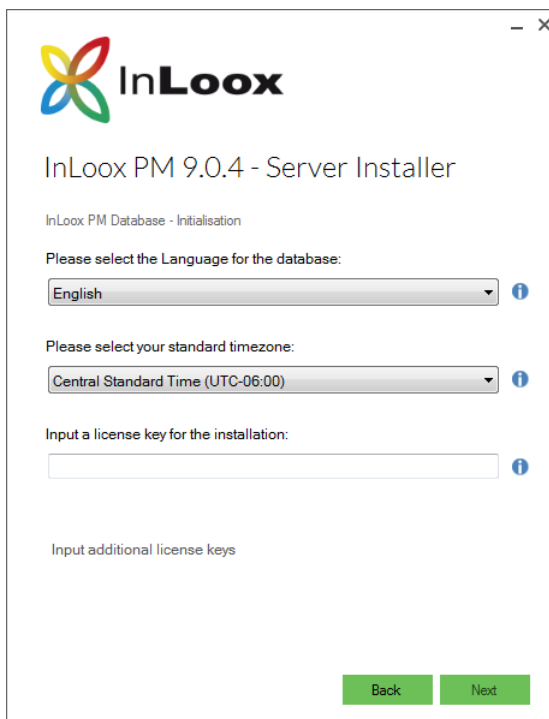


The screenshot shows the 'InLoox PM 9.0.4 - Server Installer' window. The title bar includes the InLoox logo and the text 'InLoox PM 9.0.4 - Server Installer'. Below the logo, the text 'InLoox PM Database - Credentials' is displayed. The form contains the following fields and options:

- Databasesystem:** A dropdown menu set to 'Microsoft SQL Server'.
- Servename:** A dropdown menu set to 'server'.
- Databasename:** A text input field containing 'inloox'.
- Authentication:** Two radio buttons: 'Integrated Security' (unselected) and 'Login' (selected).
- Username:** A text input field containing 'sa'.
- Password:** A password input field with masked characters '.....'.
- Additional Parameters:** A link below the password field.
- Buttons:** 'Back' and 'Next' buttons at the bottom right.

We recommend to log in via the **SQL authentication** instead of “Integrated Security”.

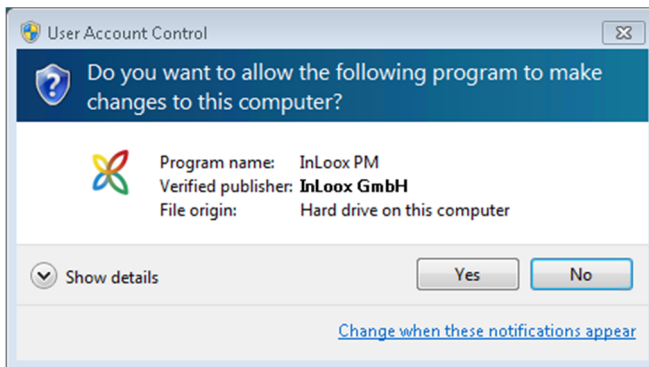
3. Select the language for the database as well as the standard time zone and enter your license keys. If you have more than one license key you can add them with a click on **Input additional license keys**. They will automatically be saved in the database. Click on **Next**.



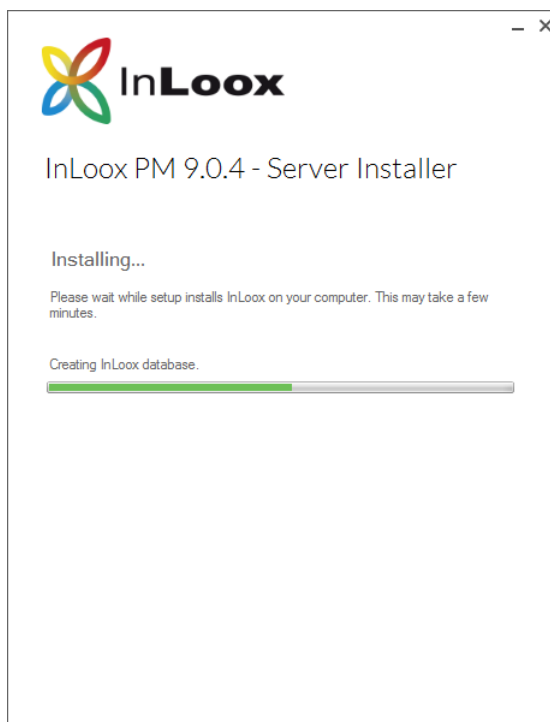
The screenshot shows the 'InLoox PM 9.0.4 - Server Installer' window. The title bar includes the InLoox logo and the text 'InLoox PM 9.0.4 - Server Installer'. Below the logo, the text 'InLoox PM Database - Initialisation' is displayed. The form contains the following fields and options:

- Language:** A dropdown menu titled 'Please select the Language for the database:' set to 'English'.
- Timezone:** A dropdown menu titled 'Please select your standard timezone:' set to 'Central Standard Time (UTC-06:00)'.
- License Key:** A text input field titled 'Input a license key for the installation:'.
- Additional License Keys:** A link titled 'Input additional license keys' below the license key field.
- Buttons:** 'Back' and 'Next' buttons at the bottom right.

- Depending on the configuration of your operating system, the user account control dialog might appear. Click on **Yes**.

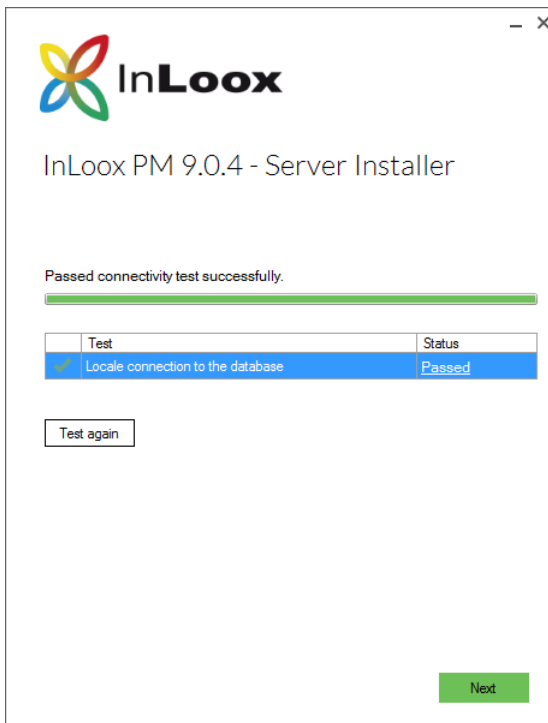


- The InLoox database is now being created and the sample data is being initialized.

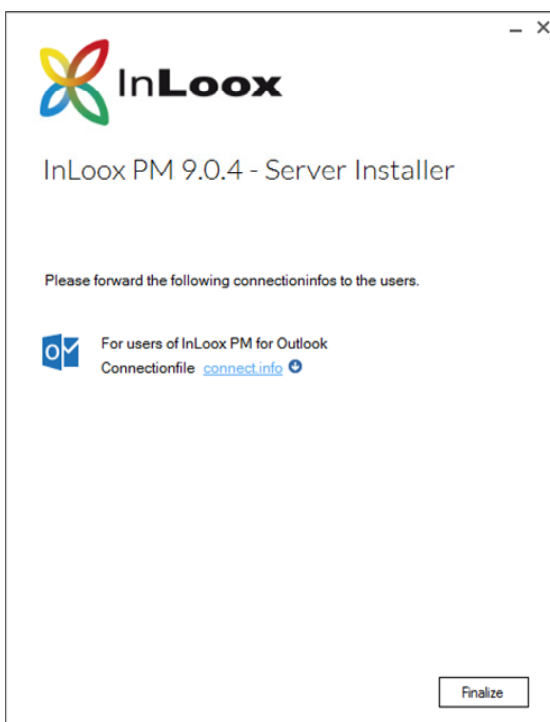




6. A short connection test starts afterwards. Click on **Next**.



7. Now you can save the connect.info file. This file contains the database connection information and is necessary for the setup of the Outlook client.



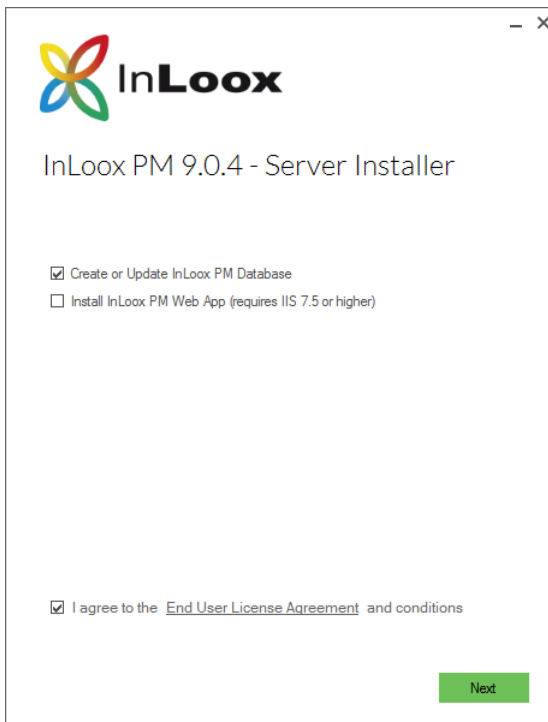
## InLoox PM Web App

Important note: **Please install the database server in advance.** See chapter **System requirements/Server**. All manufacturers that are supported by InLoox PM offer a free database product, which is ready for use within a few minutes.

1. For the installation of InLoox PM Web App the following roles and features of the IIS (Internet Information Services) are necessary Please be aware that the names can vary depending on the operating system that you are using.
  - Internet Information Services
    - Common HTTP Features
      - Default Document
      - Directory Browsing
      - HTTP Errors
      - HTTP Redirection
    - Performance Features
      - Dynamic Content Compression
      - Static Content Compression
    - Security
      - Basic Authentication
      - Request Filtering
      - Windows-Authentication
    - Application Development Features
      - .NET-Extensibility 3.5
      - .NET-Extensibility 4.5
      - ASP
      - ASP.NET 3.5
      - ASP.NET 4.5
      - ISAPI-Extensions
      - ISAPI-Filters
      - WebSocket-Protocol
  - Web Management Tools
    - IIS Management Console
    - IIS Scripting Tools
  - IIS Management Console

2. Run **InLoox\_PM\_WorkgroupEnterprise\_9XX.exe**

Select **Install InLoox PM Web App** and check **I agree to the End User License Agreement**, then click on **Next**.



3. Chose the **database type** you are using and enter the connection information. Confirm with a click on **Next**.

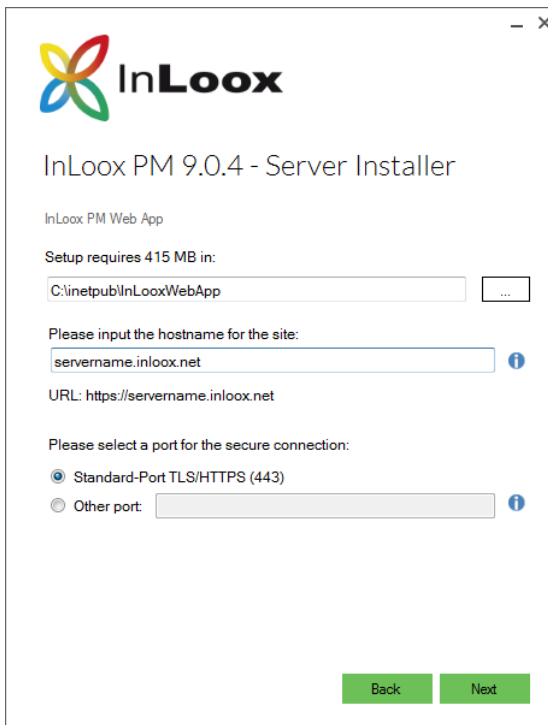


We recommend to login via the **SQL authentication** instead of “Integrated Security“

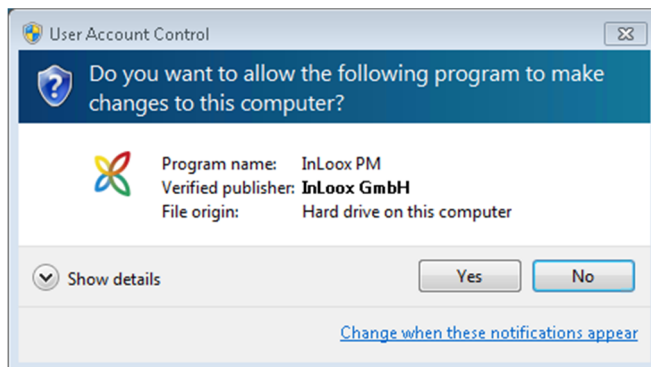
- Now you can customize the installation path and the domain name for the Web App. Furthermore you can change the default TLS/HTTPS-Port. The domain name is necessary for the sending of notifications and can also be changed at any time after the installation.

The setup automatically creates an app pool and a new site.

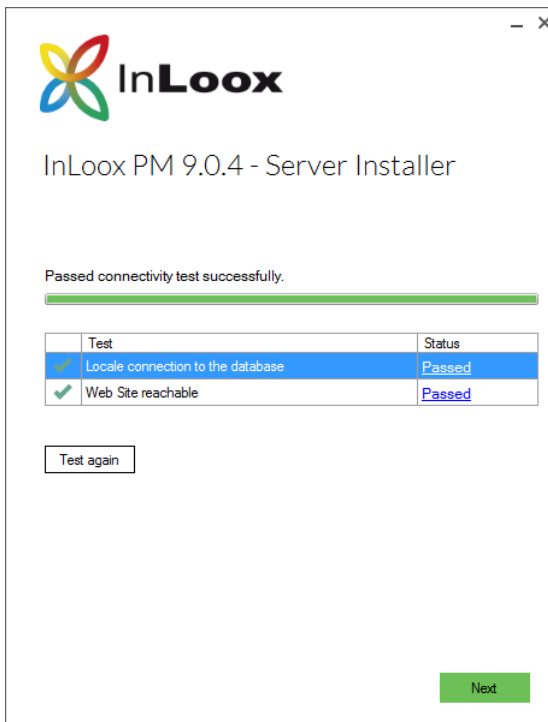
Start the installation with **Next**.



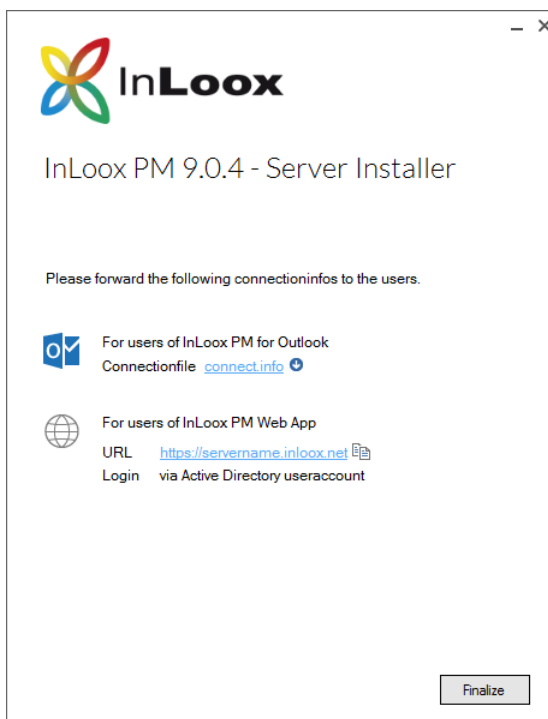
- Depending on the configuration of your operating system, the user account control dialog might appear. Click on **Yes**.



- The **InLoox Web App** is now being installed. As soon as the installation is finished, a short connection test is executed. Confirm this dialog with **Next**.



- The installation is now finished. Now you can save the connect.info file. This file contains the database connection information and is necessary for the setup of the Outlook client. Additionally, you can open the Web App directly in your default browser.



# Troubleshooting

## General errors

If you cannot create a connection to a SQL Server during installation please verify that a SQL Server is installed. Ask your system administrator. If you have access to your server, proceed as follows:

1. Open: **Start >> Control Panel >> Programs and Features** on the server  
There has to be a SQL server entry in the list of the installed software. See chapter **General Information** for a list of supported servers.
2. Open: **Start >> All programs >> Administration >> Services** on the server  
There has to be a SQL server entry in the service list. The service must be started.

Ensure that the port of the database servers is not blocked. Examine the firewall settings on the server, the clients, as well as on the network hardware. The standard ports of the databases are:

- MS SQL Server: Port 1433
- Oracle Application Server/Oracle Database: Port 1521
- MySQL Server: Port 3306

## Errors related to Microsoft SQL server

Please check the permissions of the users in the database. Consult the following whitepapers on how to do so:

**InLoox PM 9.x configuration guide for Microsoft SQL Server**  
**InLoox PM 9.x Configure Microsoft SQL Server for SQL-Authentication**

You can find them at:

<https://www.inloox.com/support/knowledge-base/white-papers/>

Furthermore, you can find a video for troubleshooting a MS SQL server installation at:

<https://www.inloox.com/support/knowledge-base/video-tutorials/troubleshooting-a-microsoft-sql-server-installation>