



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

InLoox PM 10.x Client Installation Guide & InLoox now! Account  
Set-up 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, 2014 and 2016)

The database schema of InLoox PM Workgroup/Enterprise Server 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 on hand in different language versions. Region and language settings are supported for each user location. Thus, the foundations for a 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 appropriate manufacturer for valid requirements.

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

- Microsoft SQL Server express edition

The initialization of the InLoox database is explained in the whitepaper *InLoox PM 10.x Server Installation Guide*. You can find it at:

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

### Client

For installation Windows Vista or higher and Office 2010 or higher is required. InLoox supports Windows 7, 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.

## Upgrade / Migration of Existing Projects

### Upgrade from InLoox PM 9.x

**Please create a backup of the current Database.**

The database can be upgraded with the Server Installation Package

You can find the detailed description in the whitepaper *Upgrade from InLoox PM 9.x to InLoox PM 10.x* at:  
<https://www.inloox.com/support/knowledge-base/white-papers/>

### Upgrade from older versions

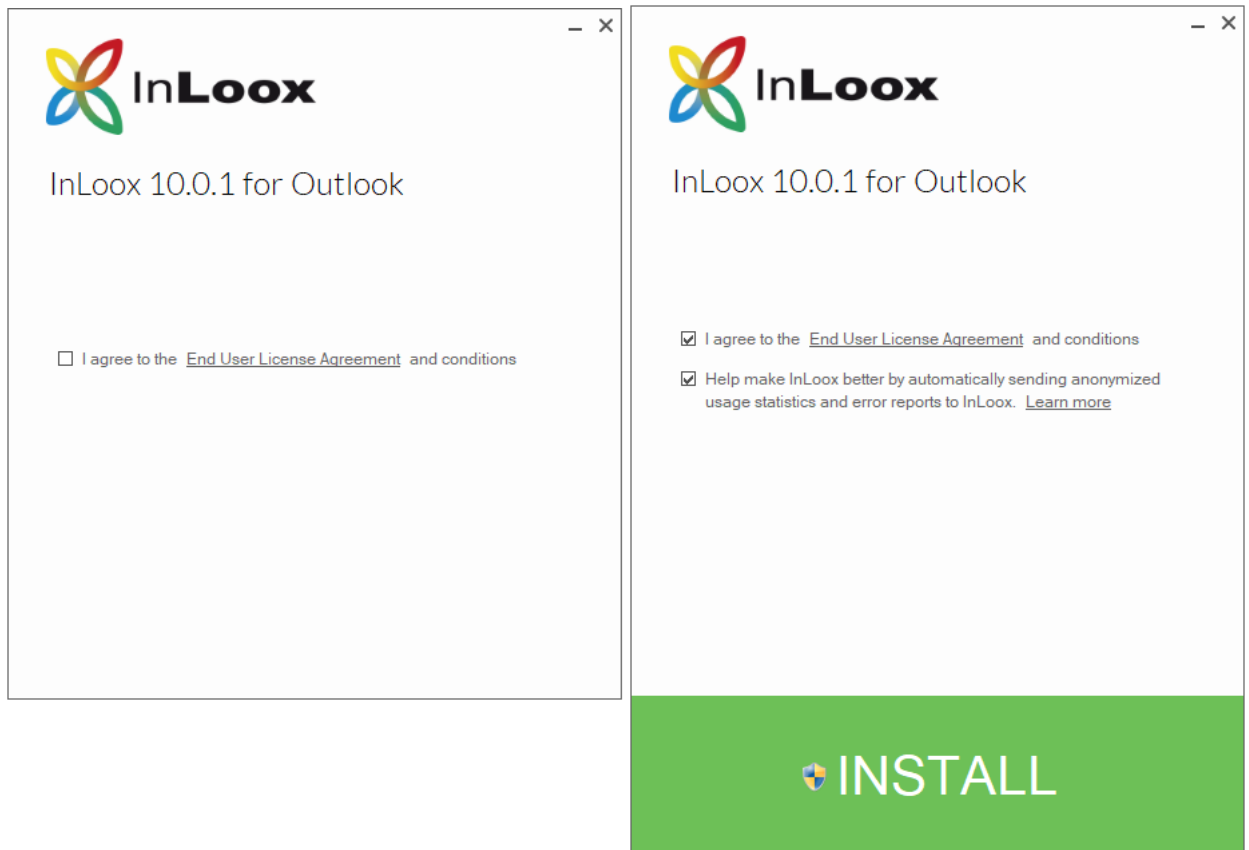
A direct upgrade from older versions (InLoox PM 8.x and older) is not possible. You will have to update the database to version 9.x first. You can find a detailed guide at: <https://www.inloox.com/support/knowledge-base/white-papers/>

## Installation

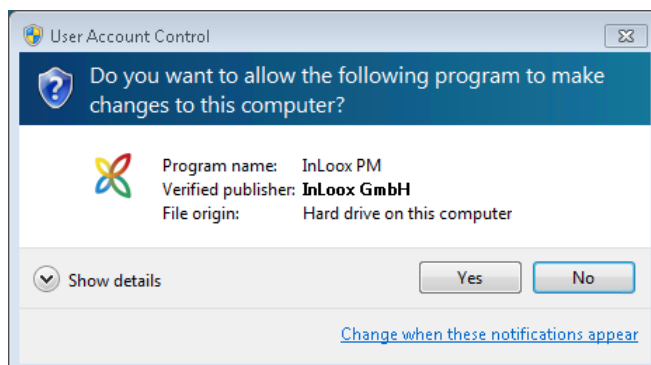
### InLoox PM Personal Edition (Single User Version)

1. Run `InLoox_PM_Personal_10XX.exe`.
2. The installation assistant starts.

Click on **I agree to the End User License Agreement**, then on **Install**.

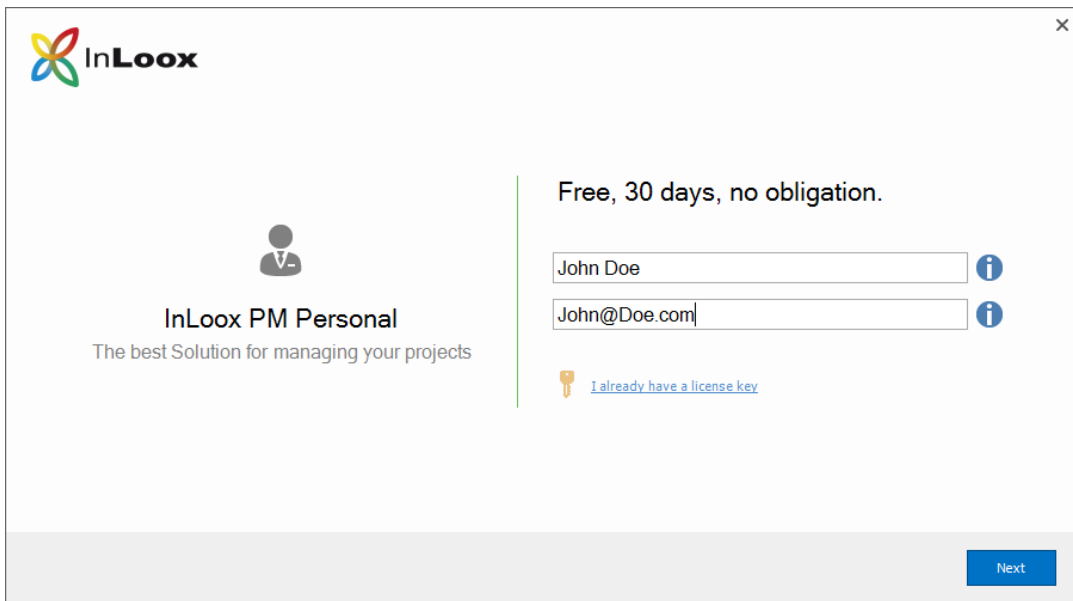


3. Depending on the configuration of your operating system, the user account control dialog appears. Click on **Next**.



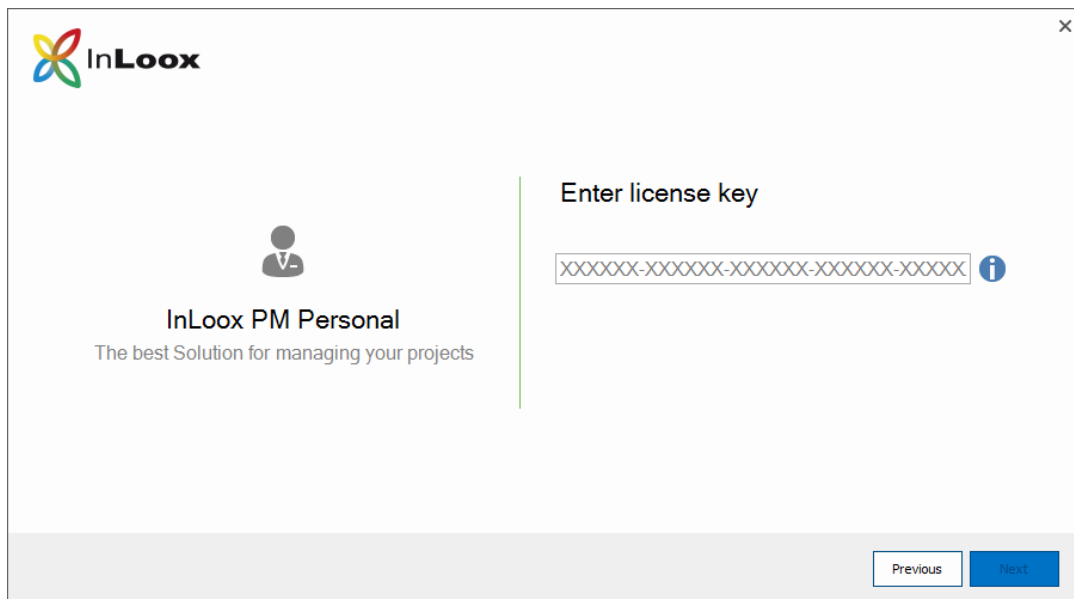
4. **InLoox** is now being installed. As soon as the setup is finished, click on **Start**. Your Outlook is starting now.

5. The InLoox Welcome Wizard opens.



The screenshot shows the InLoox Welcome Wizard registration screen. On the left, the InLoox logo is at the top, followed by a person icon and the text "InLoox PM Personal" and "The best Solution for managing your projects". On the right, the text "Free, 30 days, no obligation." is displayed above two input fields: "John Doe" and "John@Doe.com", each with an information icon. Below these fields is a link "I already have a license key" with a key icon. A "Next" button is located at the bottom right.

6. If you already have a license key you can directly enter it via a click on **I already have a license key**

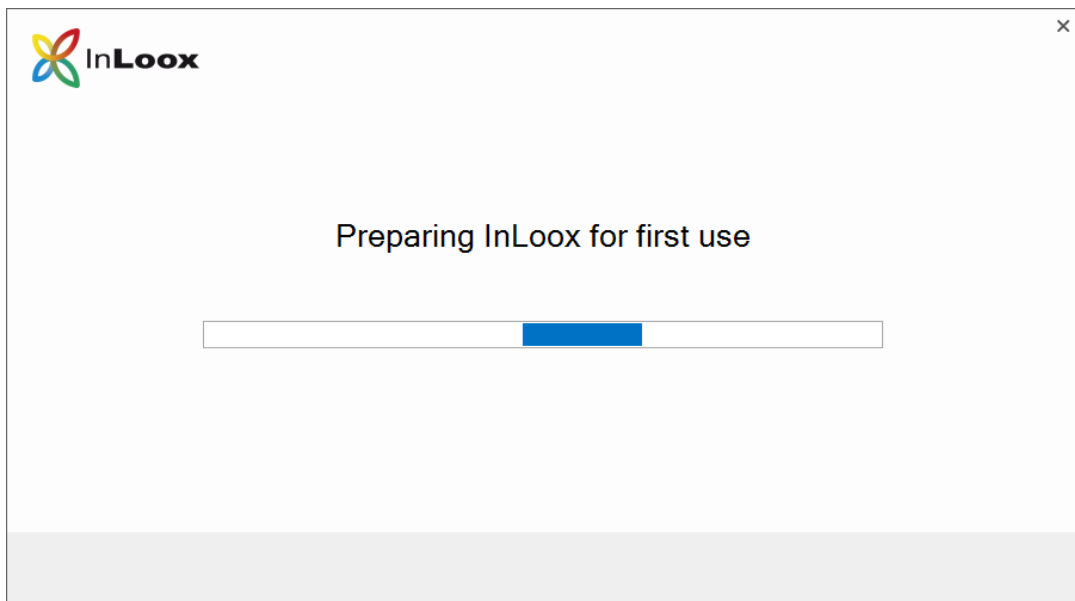


The screenshot shows the InLoox Welcome Wizard license key entry screen. On the left, the InLoox logo is at the top, followed by a person icon and the text "InLoox PM Personal" and "The best Solution for managing your projects". On the right, the text "Enter license key" is displayed above a single input field containing a masked license key "XXXXXXXX-XXXXXXXX-XXXXXXXX-XXXXXXXX-XXXXXX" with an information icon. Below the input field are "Previous" and "Next" buttons.

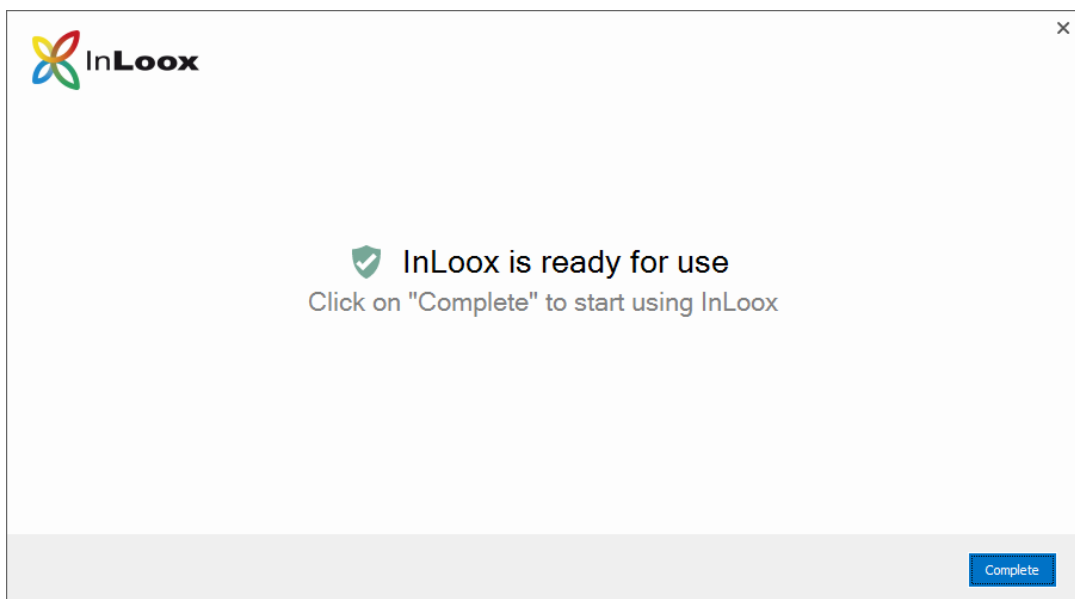
If you do not have a license key you just have to enter your name and your email address and click on **Next**. You will automatically get a license key which is valid for 30 days.

Click on **Next**.

7. Your **InLoox database** is now being initialized.



8. The **InLoox Welcome Wizard** has now successfully initialized your database. A click on **Complete** automatically opens the project list and you can view the InLoox sample projects.

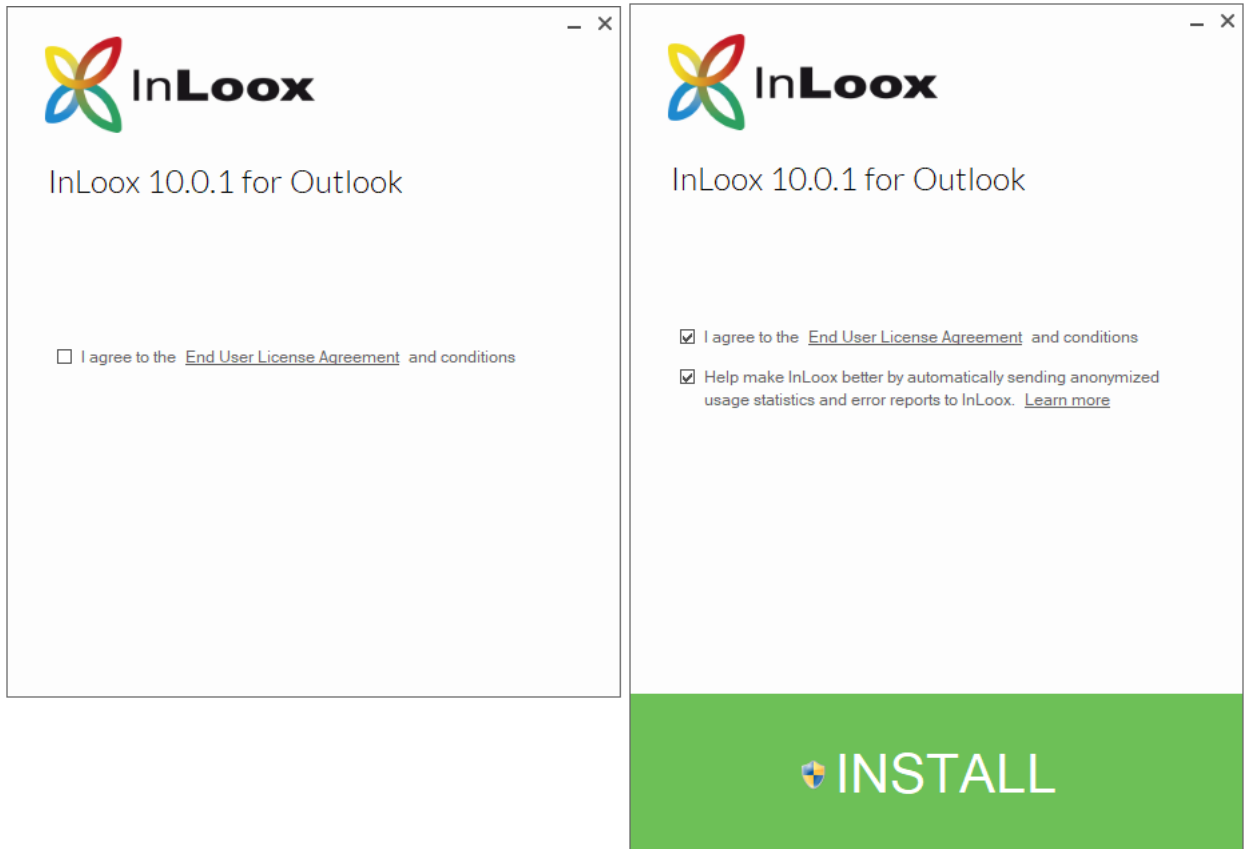


## InLoox PM Workgroup / Enterprise Server (Network-/Multiuser version)

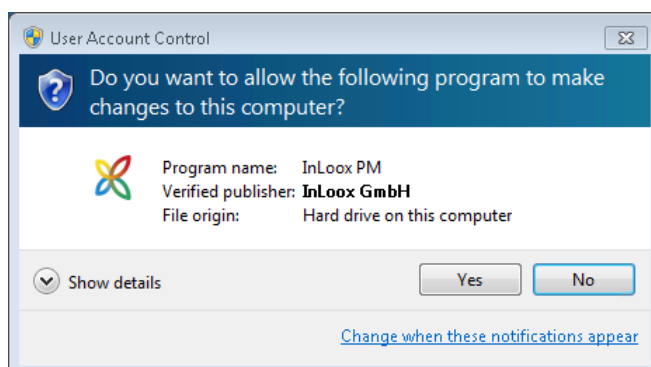
**Important note:** Please install the database server in advance. See chapter **System requirements/Server**. All manufacturers that are supported by InLoox PM offer a free database product, which is ready to use within a few minutes.

1. Run `InLoox_PM_Outlook_Client_10XX.exe`.
2. The installation assistant starts.

Click on **I agree to the End User License Agreement**, then on **Install**.

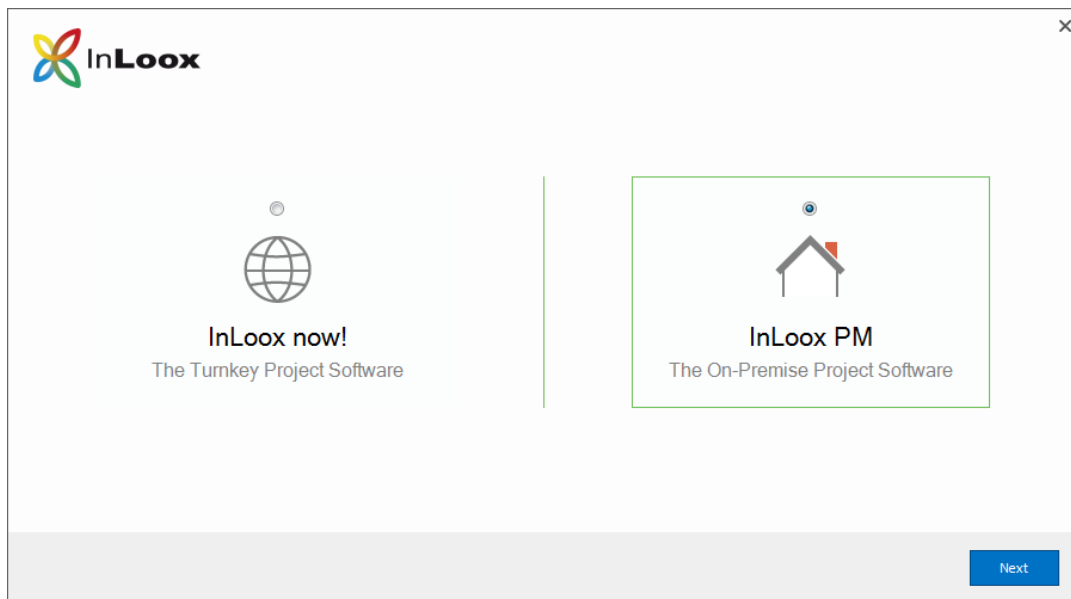


3. Depending on the configuration of your operating system, the user account control dialog appears. Click on **Yes**.



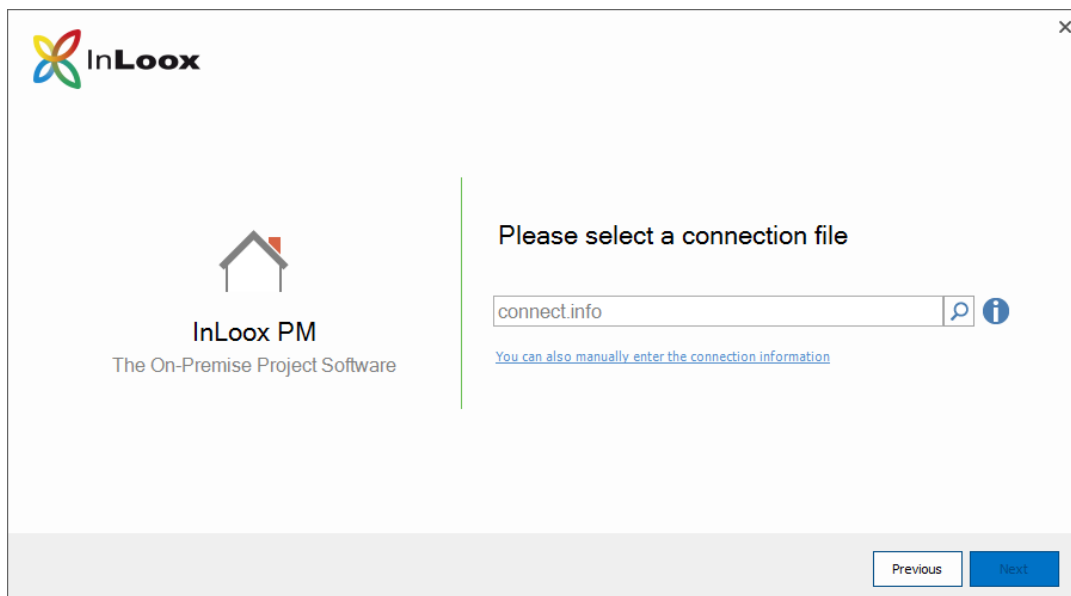


4. **InLoox** is now being installed. As soon as the setup is finished, click on **Start**. Your Outlook is starting now.
5. The **InLoox Welcome Wizard** is opens. Please select **InLoox PM** and click on **Next**.

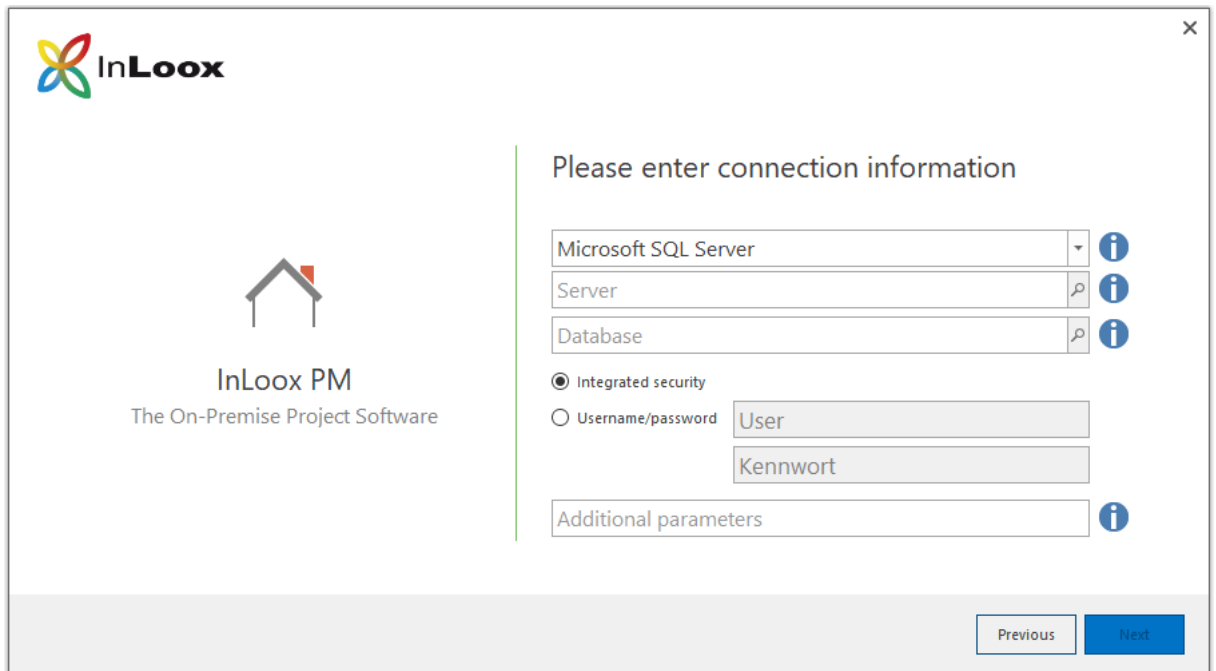


6. Now you can select the connection file **connect.info**, which can be created at the end of the server installation process.

Alternatively, you can enter the connection information manually.

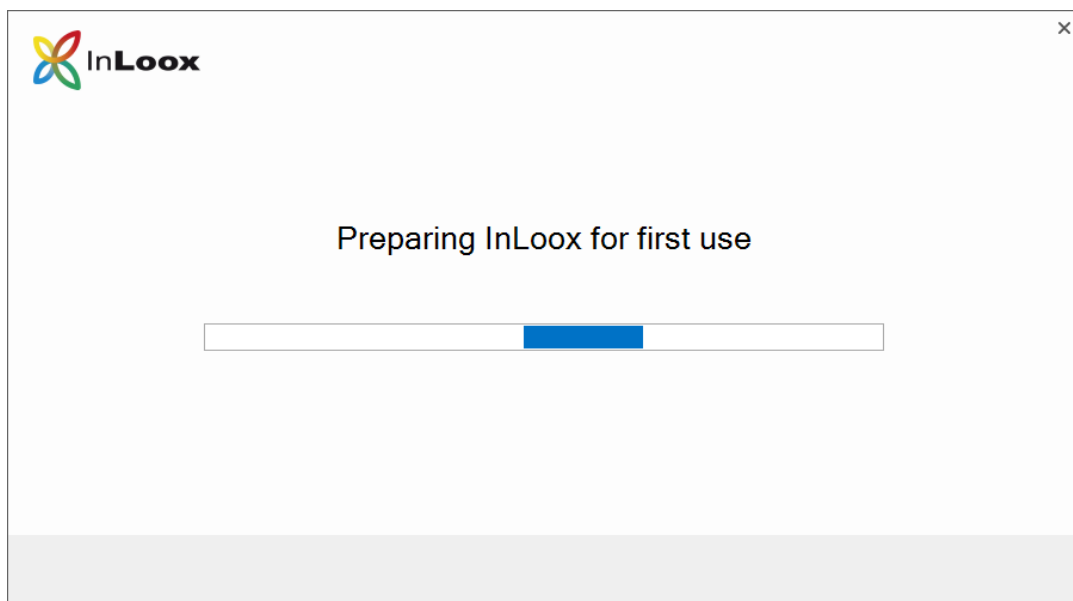


- Choose the **database type** you are using and enter the connection information. Confirm with a click on **Next**.<sup>1</sup>



The screenshot shows the InLoox PM configuration window. On the left, the InLoox logo is at the top, followed by a house icon and the text "InLoox PM The On-Premise Project Software". On the right, the title "Please enter connection information" is displayed. Below the title are several input fields: a dropdown menu for "Microsoft SQL Server" with an information icon, a text field for "Server" with a search icon and an information icon, a text field for "Database" with a search icon and an information icon, a radio button for "Integrated security" (which is selected), a radio button for "Username/password" with a text field for "User" and a text field for "Kennwort", and a text field for "Additional parameters" with an information icon. At the bottom right, there are "Previous" and "Next" buttons.

- The connection to the **InLoox database** is now being established.



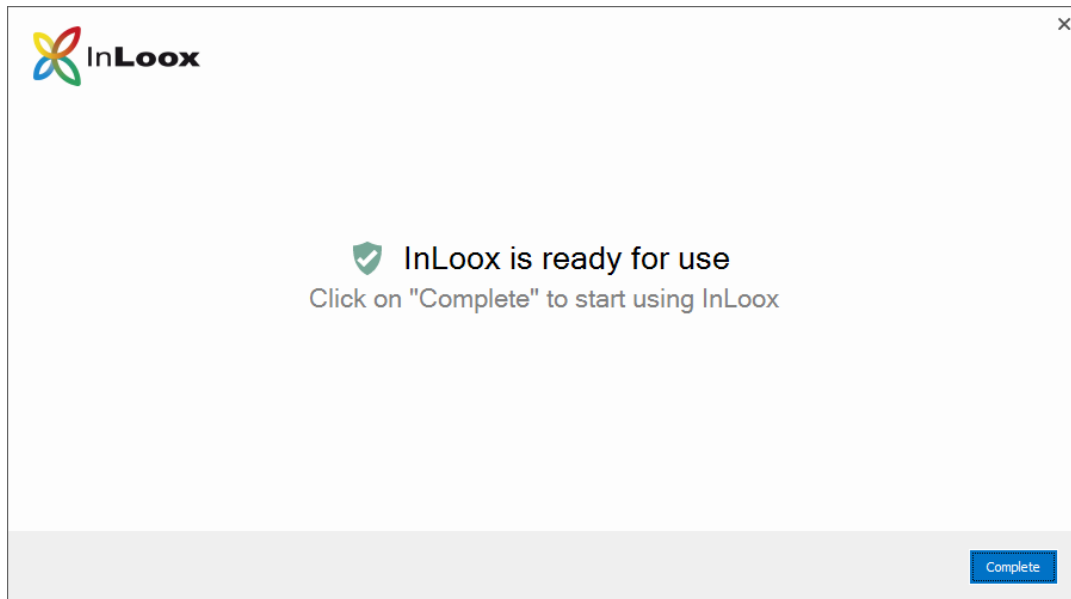
<sup>1</sup>Notes for Microsoft SQL Server:

The default instance name for a Microsoft SQL Express installation is **SQLExpress**, here the server name would be <server>\SQLExpress.

In a full version of Microsoft SQL Server it would be <server> since the default instance name is empty. (Replace <server> with the name or IP of the hosting server)

Important! When using Integrated Security you have to set the permissions for all users who will use InLoox PM. Please consult the whitepaper **InLoox PM 10.x configuration guide for Microsoft SQL Server** for detailed information.

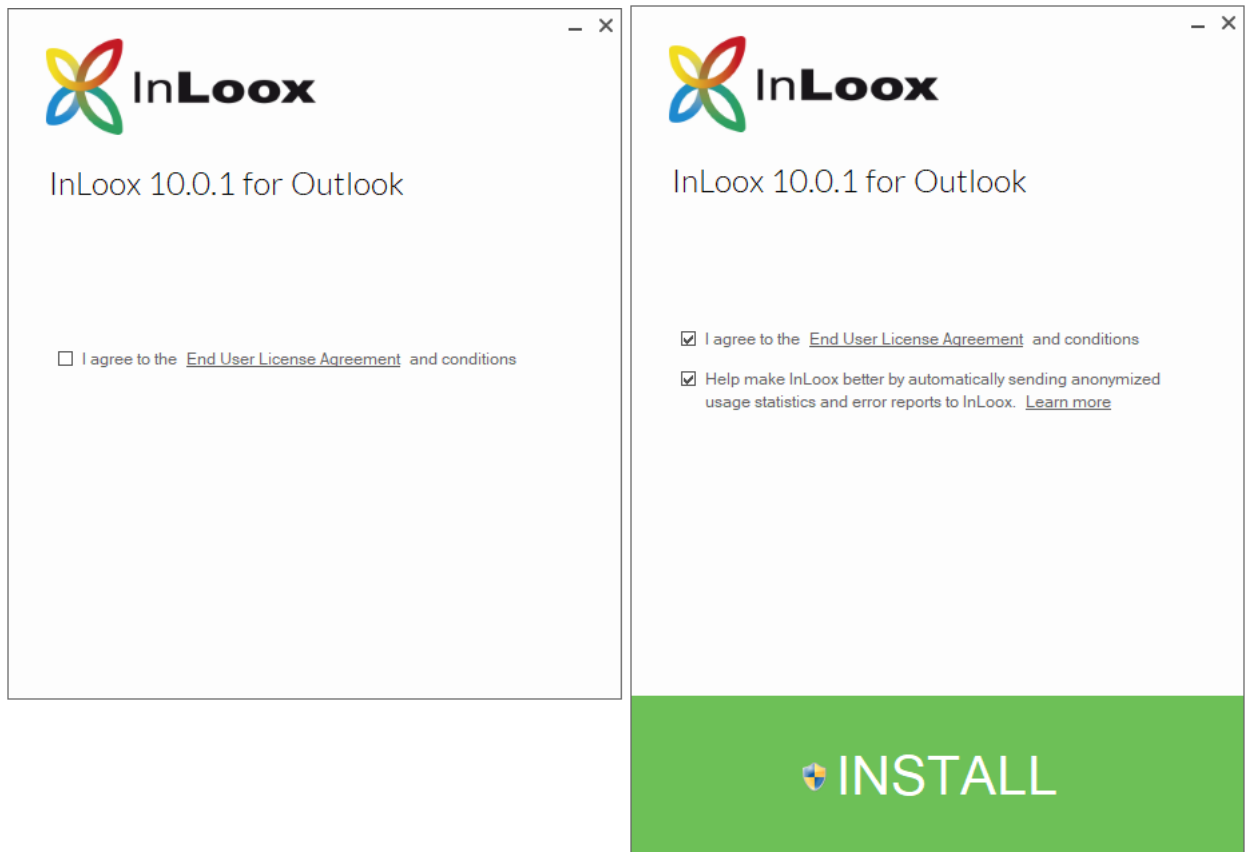
10. The InLoox Welcome Wizard has now successfully configured your database connection. A click on **Complete** automatically opens the project list and you can view the InLoox sample projects.



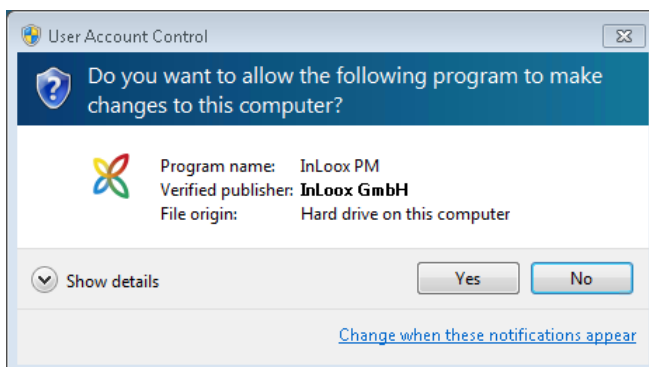
## InLoox now! (cloud version)

1. Run `InLoox_PM_Outlook_Client_10XX.exe`.
2. The installation assistant starts.

Click on **I agree to the End User License Agreement**, then on **Install**.

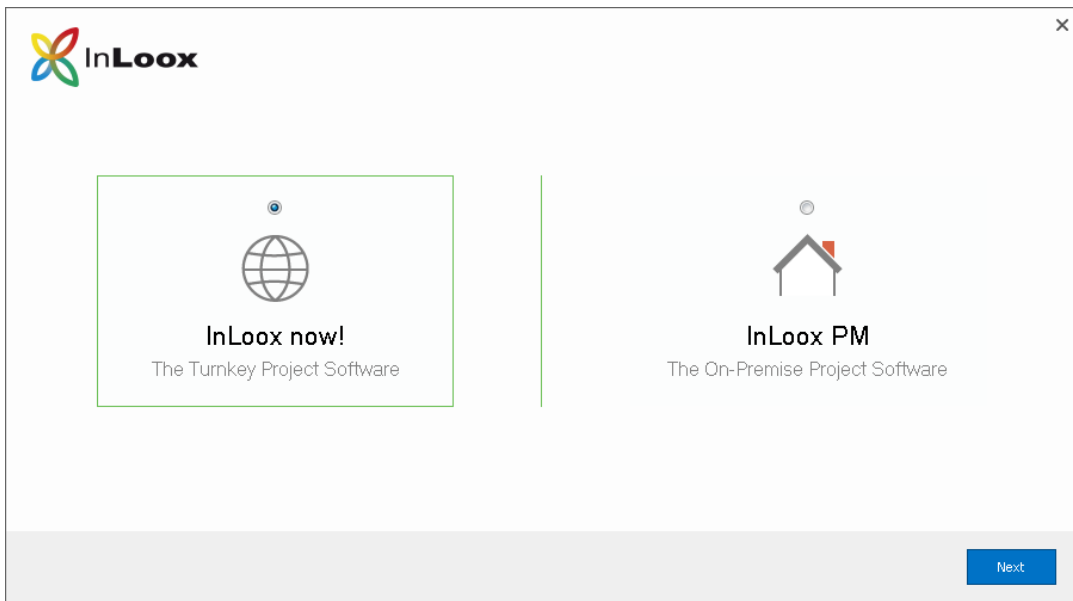


3. Depending on the configuration of your operating system, the user account control dialog appears. Click on **Next**.

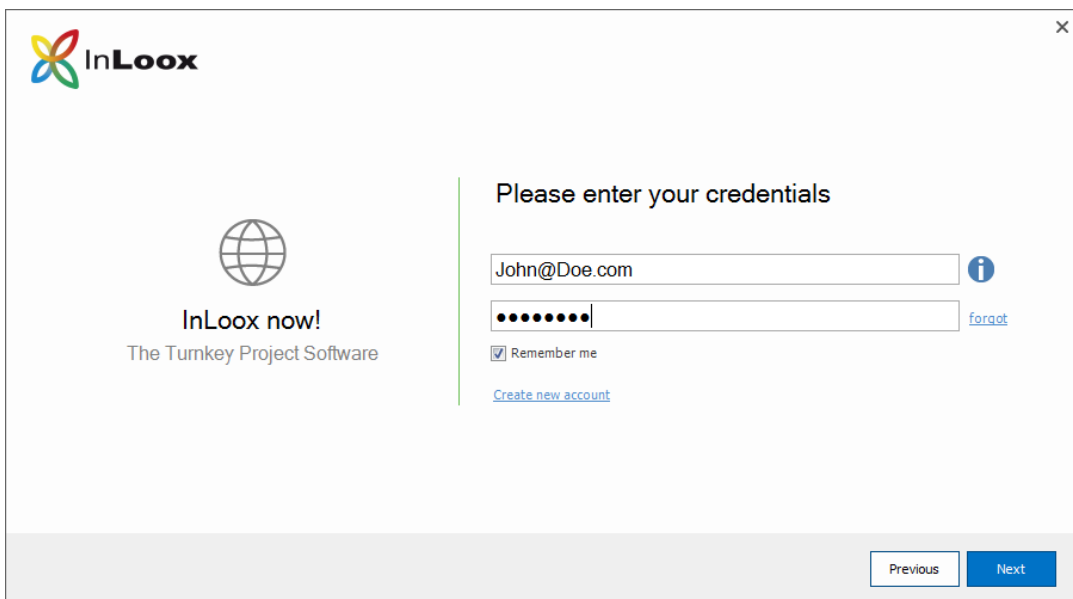


4. **InLoox** is now being installed. As soon as the setup is finished, click on **Start**. Your Outlook is starting now.

5. The InLoox Welcome Wizard is opening now. Please select **InLoox now!** and click on **Next**.

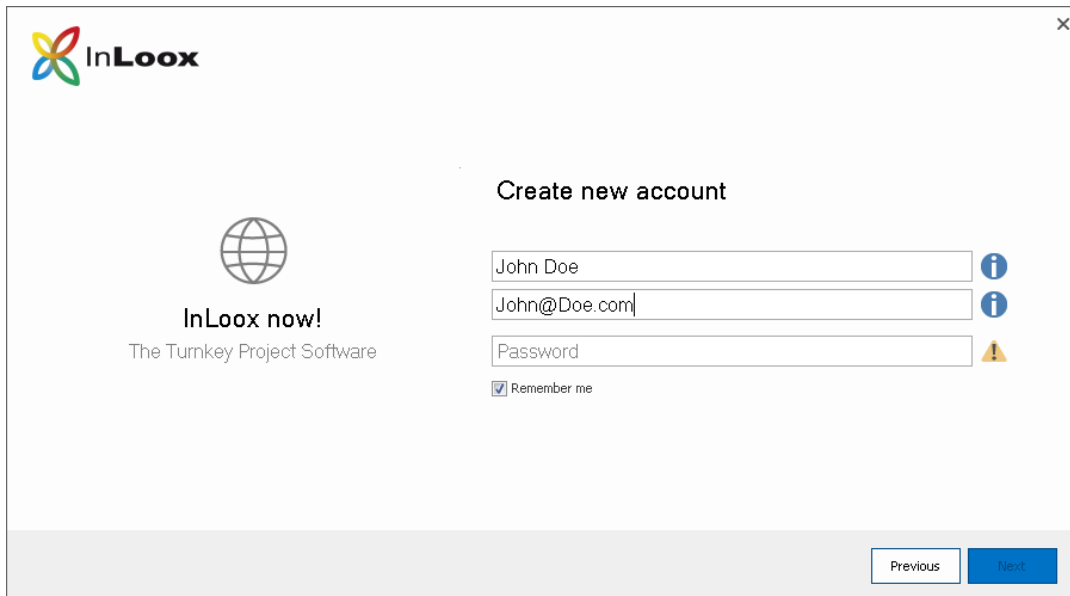


6. If you already have an InLoox now! account you can directly login with your credentials.



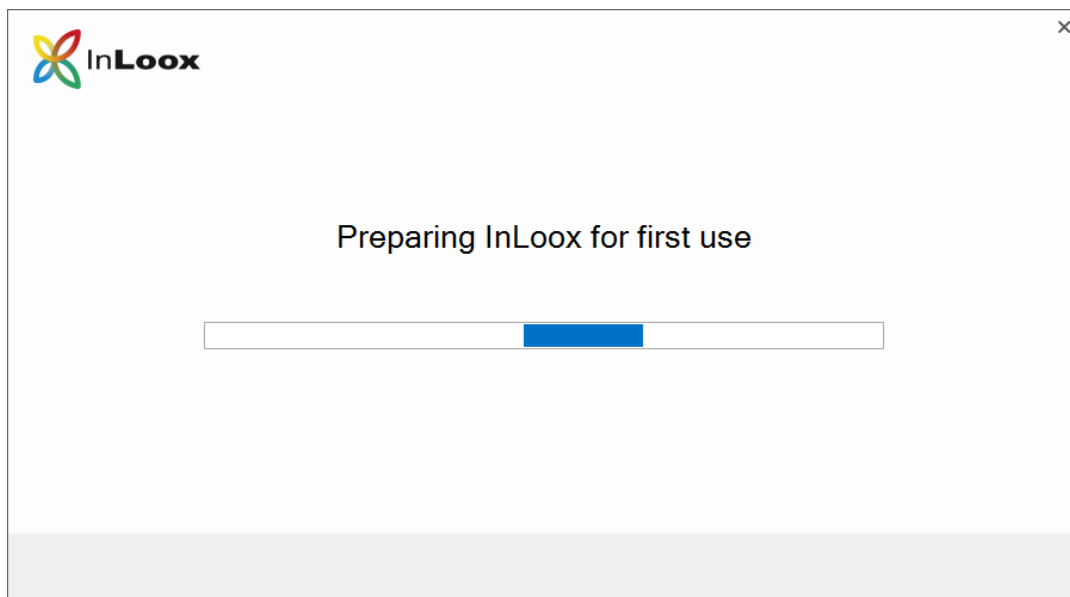
7. As an alternative you can create a new account for **InLoox now!** To do so click on **Create new account**.

Enter your name, email address, and a password, then click on **Next**.

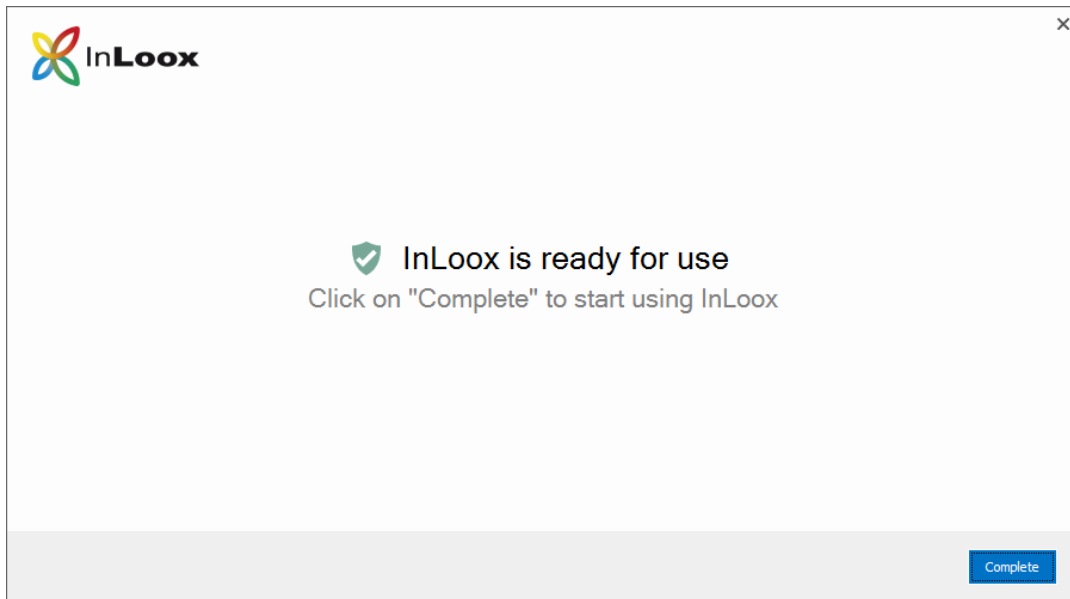


The screenshot shows a window titled "InLoox" with a close button in the top right corner. On the left side, there is a globe icon and the text "InLoox now! The Turnkey Project Software". On the right side, under the heading "Create new account", there are three input fields: "John Doe" (with an information icon), "John@Doe.com" (with an information icon), and "Password" (with a warning icon). Below the password field is a checked checkbox labeled "Remember me". At the bottom right, there are two buttons: "Previous" and "Next".

8. Your InLoox now! account is now being prepared.



9. The **InLoox Welcome Wizard** has now successfully prepared your InLoox now! account. A click on **Complete** automatically opens the project list and you can view the InLoox sample projects.



## 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
2. 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.
3. Open: **Start >> All programs >> Administration >> Services** on the server
4. 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

### Errors related to Microsoft SQL server

Please check the permissions of the users on the database. Consult the following whitepapers:

*InLoox PM 10.x configuration guide for Microsoft SQL Server*

*InLoox PM 10.x Configure Microsoft SQL Server for SQL-Authentication*

You can find them at:

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