



Project management – integrated into Outlook

InLoox 5.x Installation Guide

An IQ medialab 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 available version of InLoox is fundamentally different from predecessor generations of the product. Numerous innovations were realized together with customers and partners. In the course of an effective authorization concept and for the improvement of response times the data retention was changed to SQL („*Structured Query Language*“).

Supported database management systems with network usage 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 (versions 5.0)

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

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

InLoox is internationalized and is present 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 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, offer a free database product:

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

Client

For installation Windows 2000 (with Service Pack 3) or higher and Office 2000 or higher is required. InLoox also supports Windows Vista, Office 2007, Terminal Server as well as the 64Bit versions of Windows XP and Windows Vista.

The system requirements depend on the used versions.

InLoox automatically installs Microsoft .NET Framework 2.0 on 32Bit systems as a prerequisite.

On 64Bit systems you have to install the .Net Framework 2.0 manually e.g. over the Windows updates.

Upgrade/migration of existing projects

Upgrade of InLoox 4.x

An import function for project data created with InLoox 4.x is available. You find it in the InLoox Toolbar under **Tools >> Import version 4.x data...** A parallel operation of version 4 and 5 is possible.

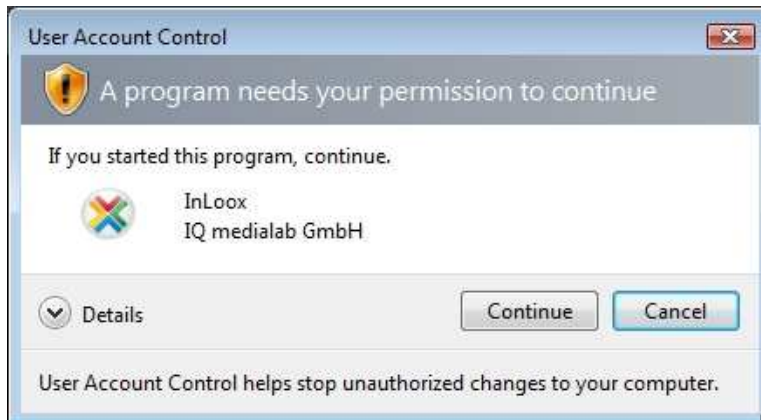
Upgrade of older versions

A direct upgrade of older InLoox versions is not possible. Please update your data to InLoox 4.1.2 first and use the import function for InLoox 4.x projects afterwards.

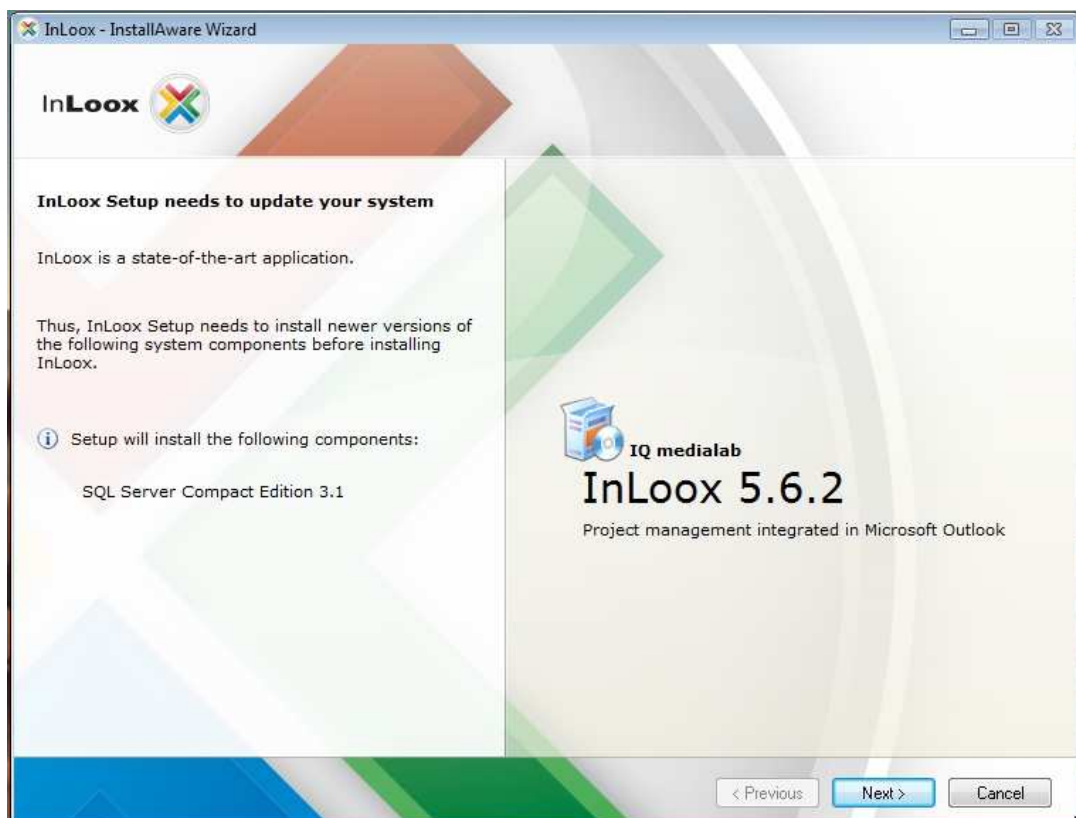
Installation

InLoox Personal Edition (single place version)

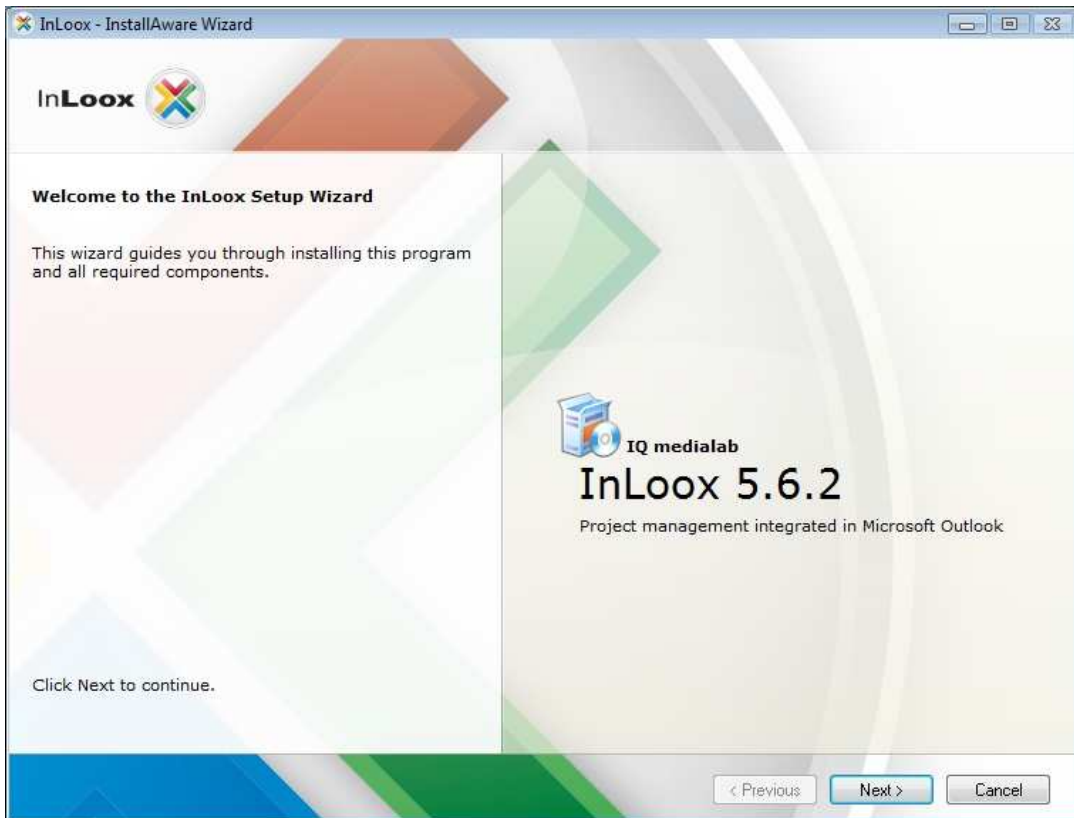
1. Run **InLoox_Personal.exe**
2. Under Windows Vista the dialog of the „User Account Control“ appears. Click on **Continue**



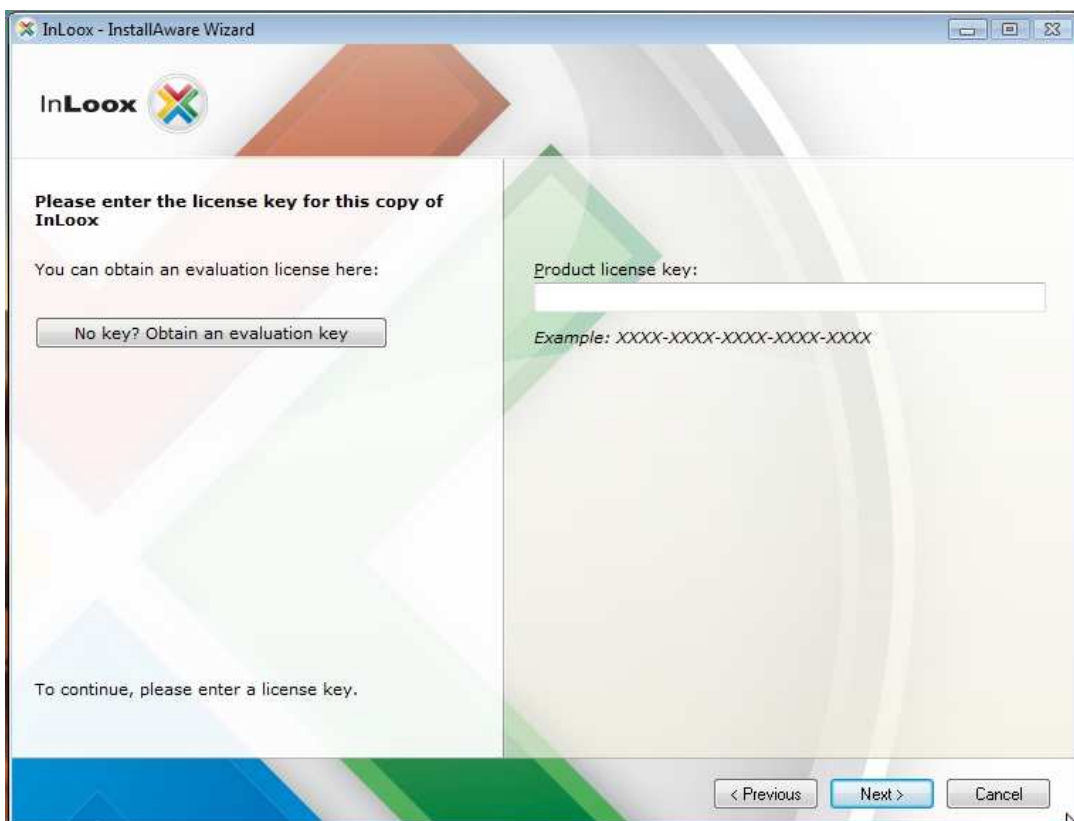
3. The installation assistant is started
4. Select the desired installation language
5. The system requirements are examined and if necessary components are installed. Click on **Next**. The installation can take several minutes depending on extent.



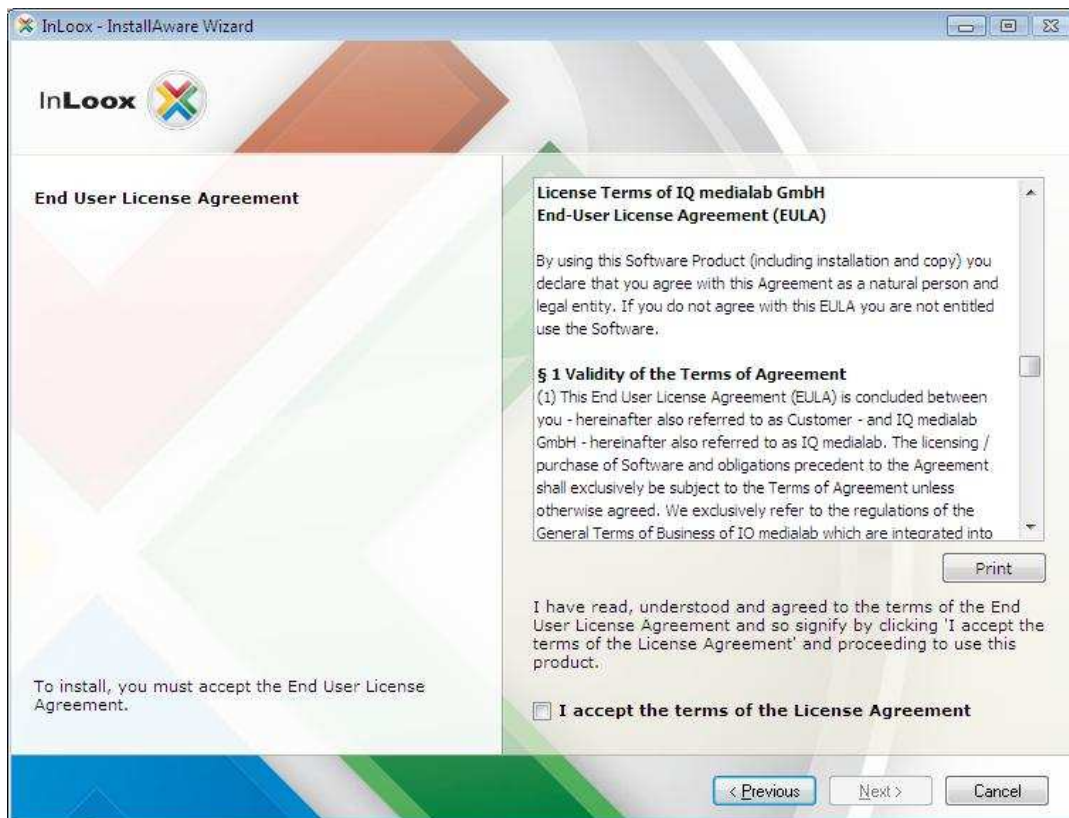
6. Click on **Next**



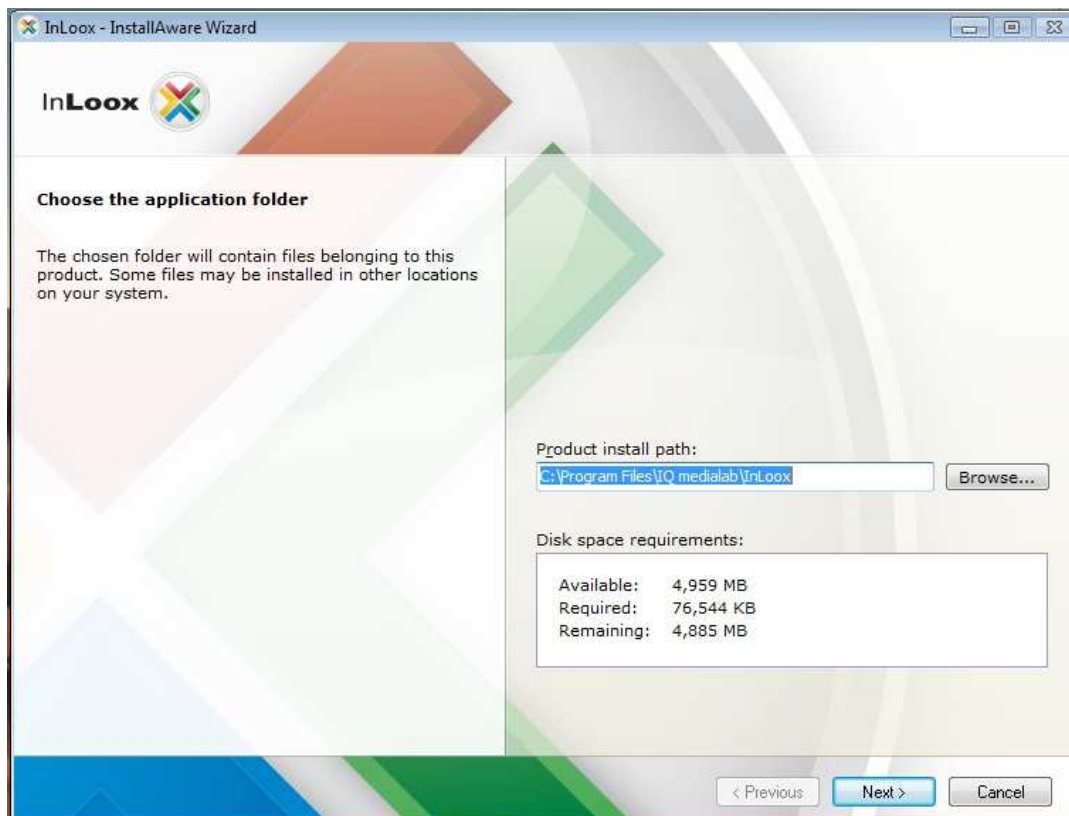
7. Enter your InLoox license key and click on **Next**



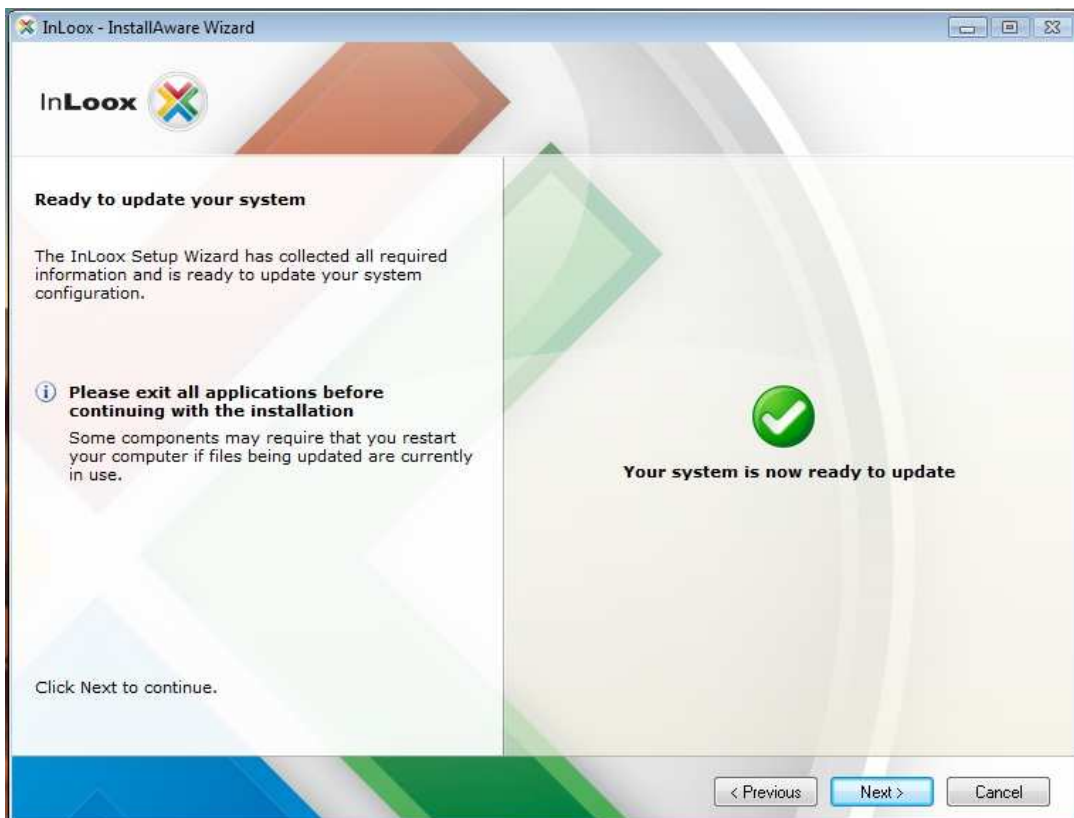
- Click on *I accept the terms of the License Agreement*, then on *Next*



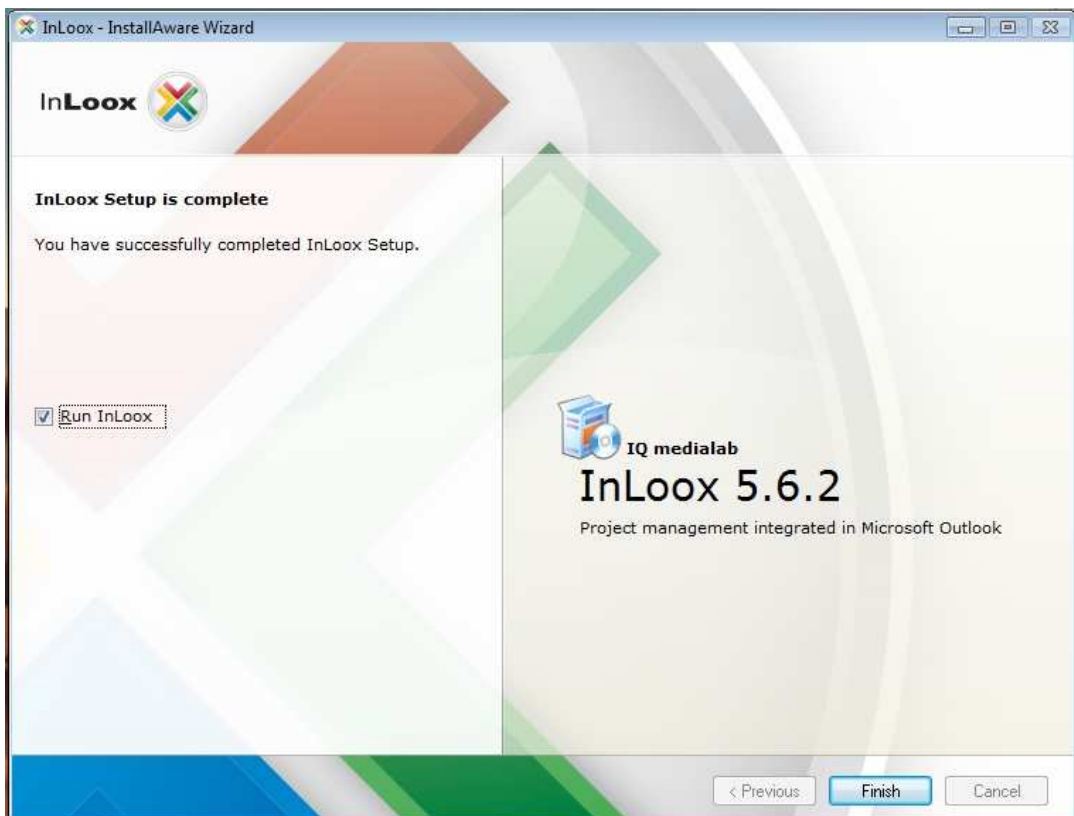
- If desired change the standard path and click on *Next*



10. Click on **Next**



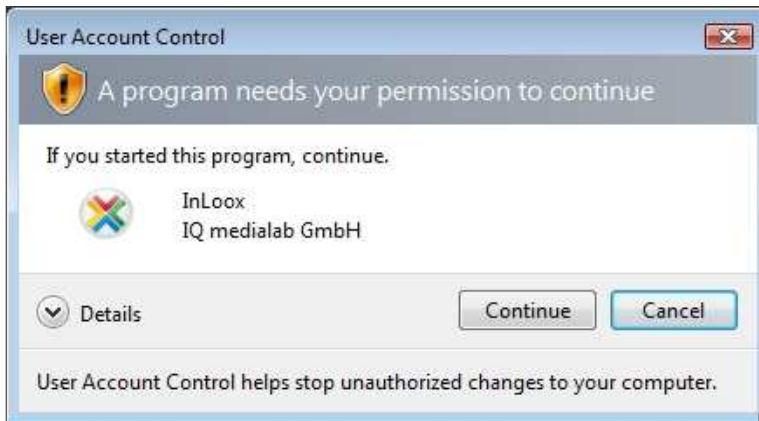
11. Click on **Finish**



InLoox Workgroup/Enterprise Edition (Network version)

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

1. Run InLoox_ WorkgroupEnterprise.exe
2. Under Windows Vista the dialog of the „User Account Control“ appears. Click on **Continue**

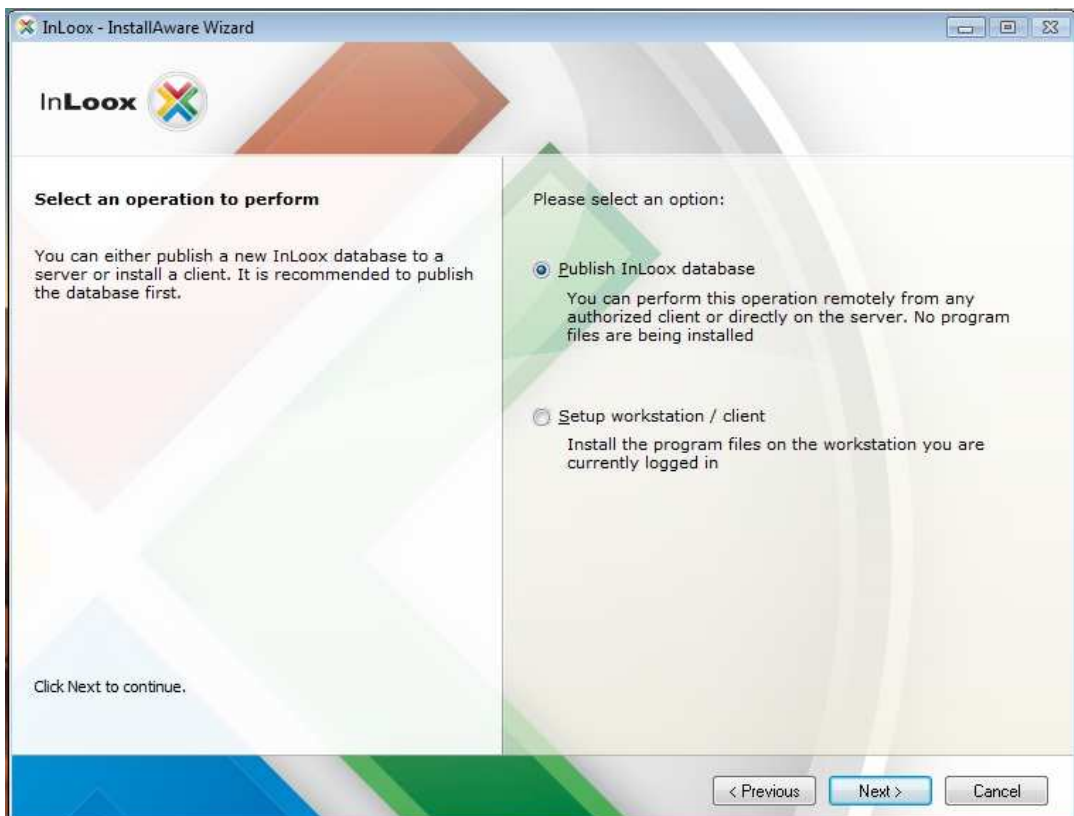


3. The installation assistant is started
4. Select the desired installation language
5. The system requirements are examined and if necessary components are installed. Click on **Next**. The installation can take several minutes depending on extent.

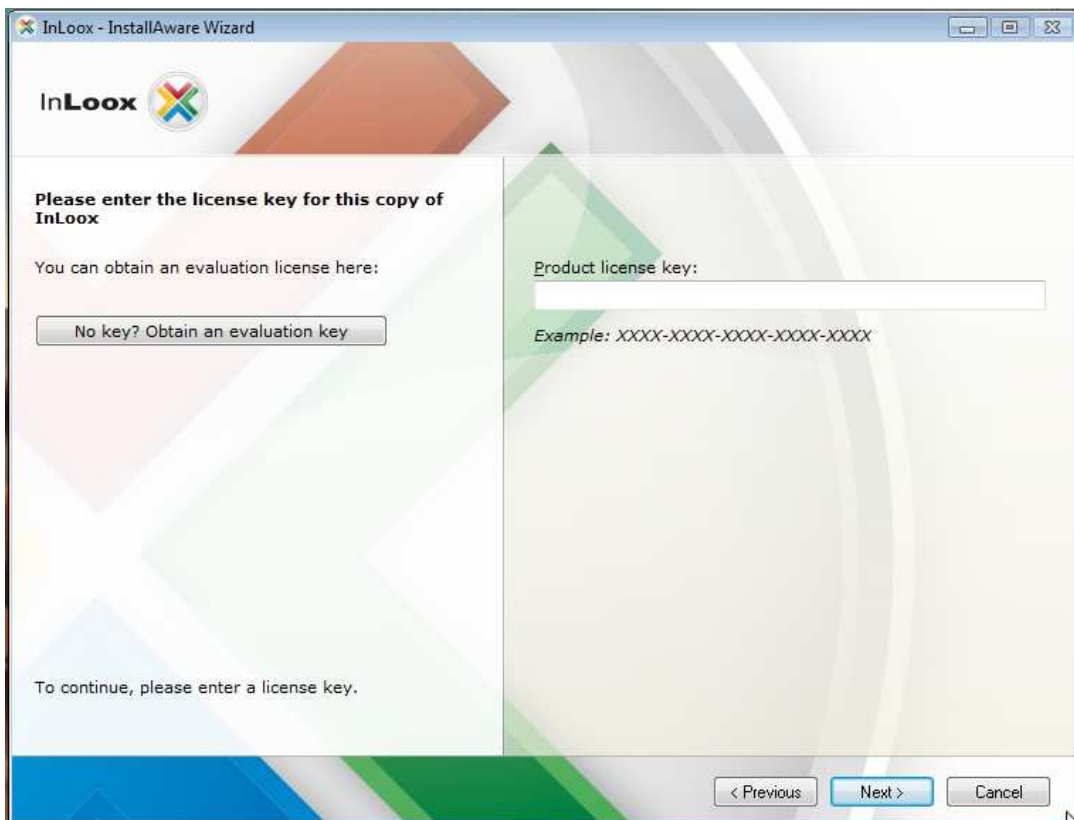
6. Click on **Next**



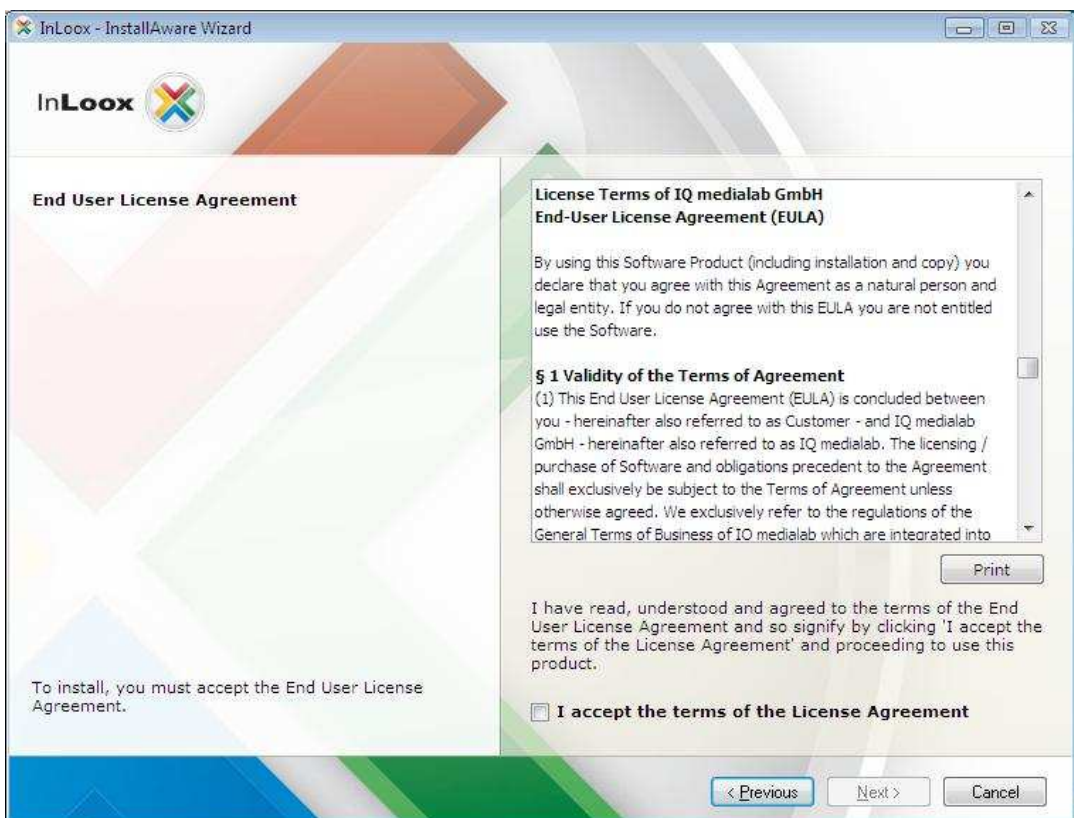
7. Select **Publish InLoox database** and click on **Next**



8. Enter your InLoox license key and click on **Next**



9. Click on **I accept the terms of the License Agreement**, then on **Next**



10. Select the database system which should be used, e.g. „Microsoft SQL server “

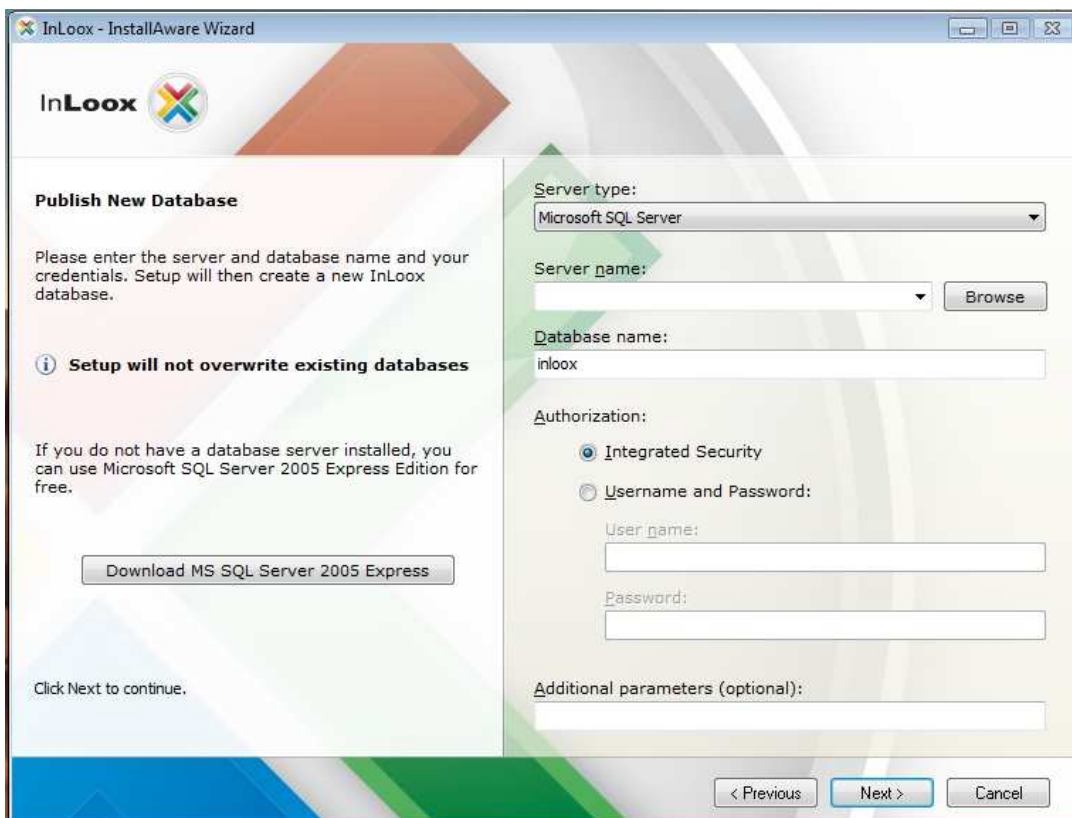
You can scan for available „Microsoft SQL Server“ on the network. Select a server from the list of available Microsoft SQL Servers. If you use another type of server, please fill in the server names manually.

The database name can be freely assigned. Note that the database must not be present. The installation assistant creates a new database.

The authorization mode **Integrated Security** is applicable for „Microsoft SQL Server “. Other database manufacturers only offer authorization with user name and password as default. In each case you need the authorization to publish a new database. If an appropriate authorization is not present, the installation cannot be continued. Please check the chapter „Troubleshooting“, if problems occur.

Additional parameters are needed, in order to set different port numbers or timeout settings. A different setting is normally not necessary.

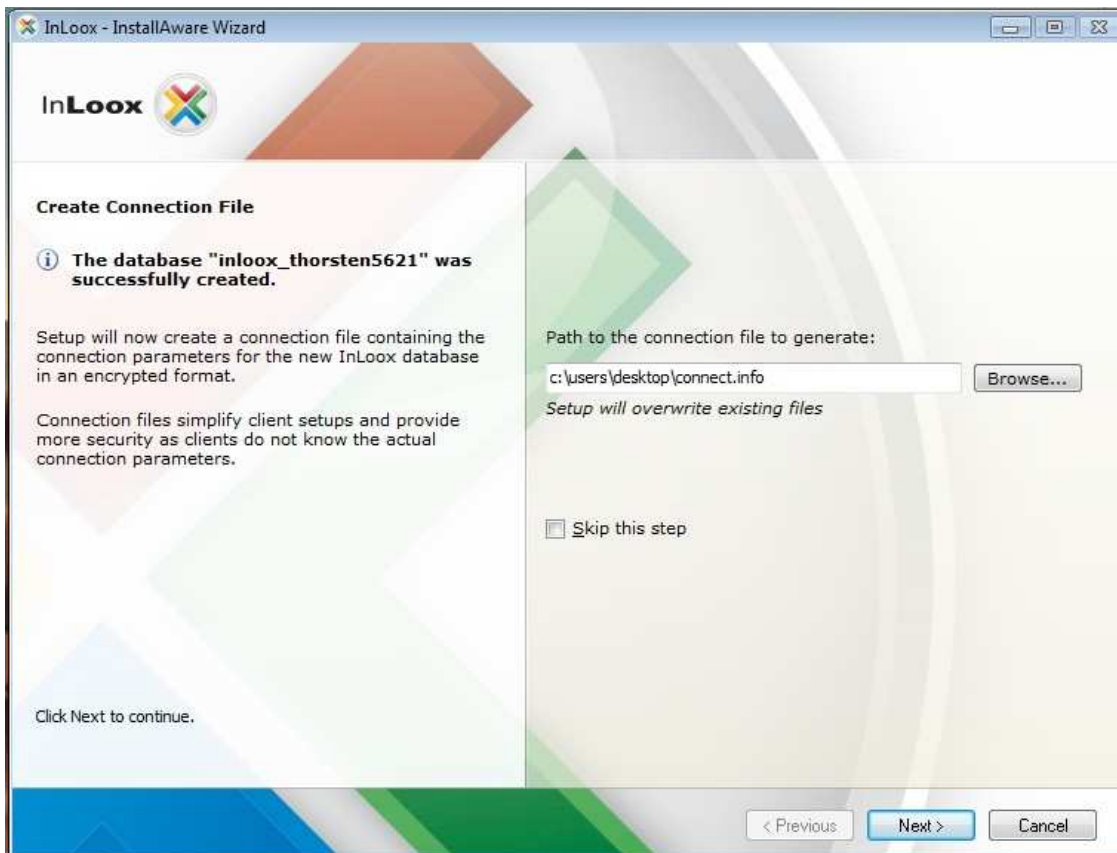
Click on **Next** after setting the values.



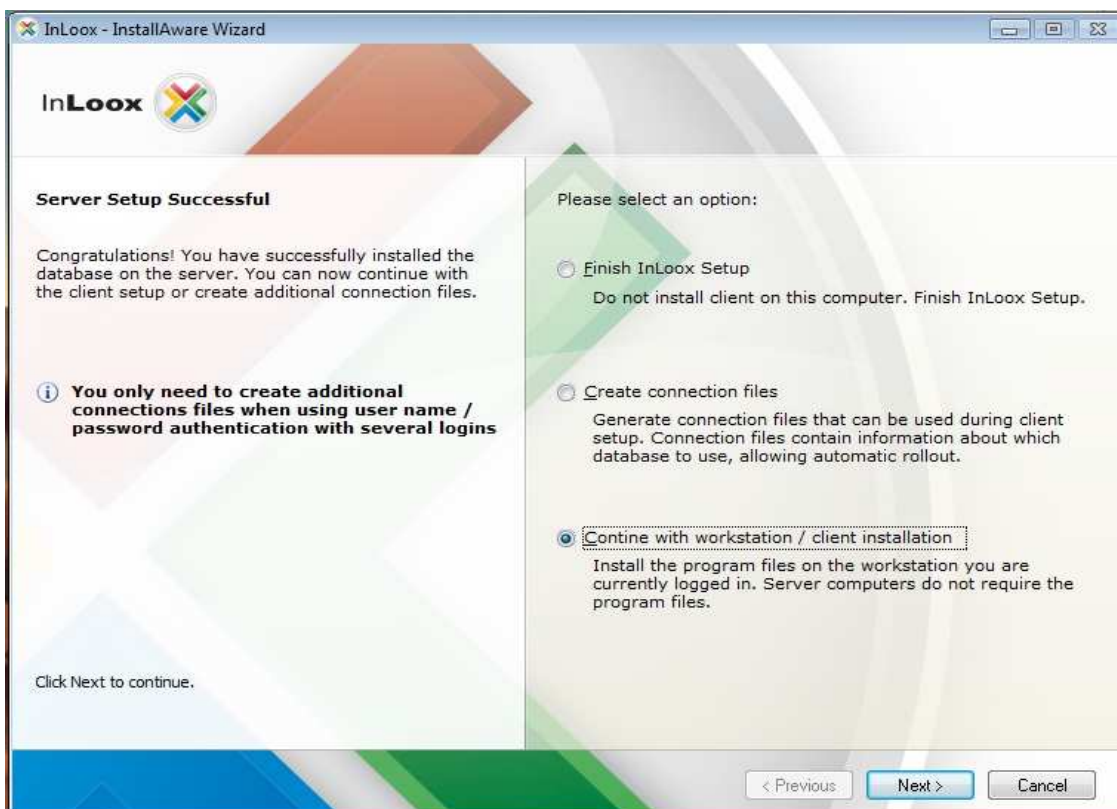
The screenshot shows the 'InLoox - InstallAware Wizard' window. The title bar reads 'InLoox - InstallAware Wizard'. The window contains the following elements:

- Header:** InLoox logo and a large orange arrow pointing right.
- Section:** **Publish New Database**
- Text:** Please enter the server and database name and your credentials. Setup will then create a new InLoox database.
- Warning:** **Setup will not overwrite existing databases** (with an information icon).
- Text:** If you do not have a database server installed, you can use Microsoft SQL Server 2005 Express Edition for free.
- Button:** Download MS SQL Server 2005 Express
- Text:** Click Next to continue.
- Form Fields:**
 - Server type:** A dropdown menu with 'Microsoft SQL Server' selected.
 - Server name:** A text input field with a 'Browse' button to its right.
 - Database name:** A text input field containing 'inloox'.
 - Authorization:** Two radio buttons: 'Integrated Security' (selected) and 'Username and Password'.
 - User name:** A text input field.
 - Password:** A text input field.
 - Additional parameters (optional):** A text input field.
- Navigation:** '< Previous', 'Next >', and 'Cancel' buttons at the bottom right.

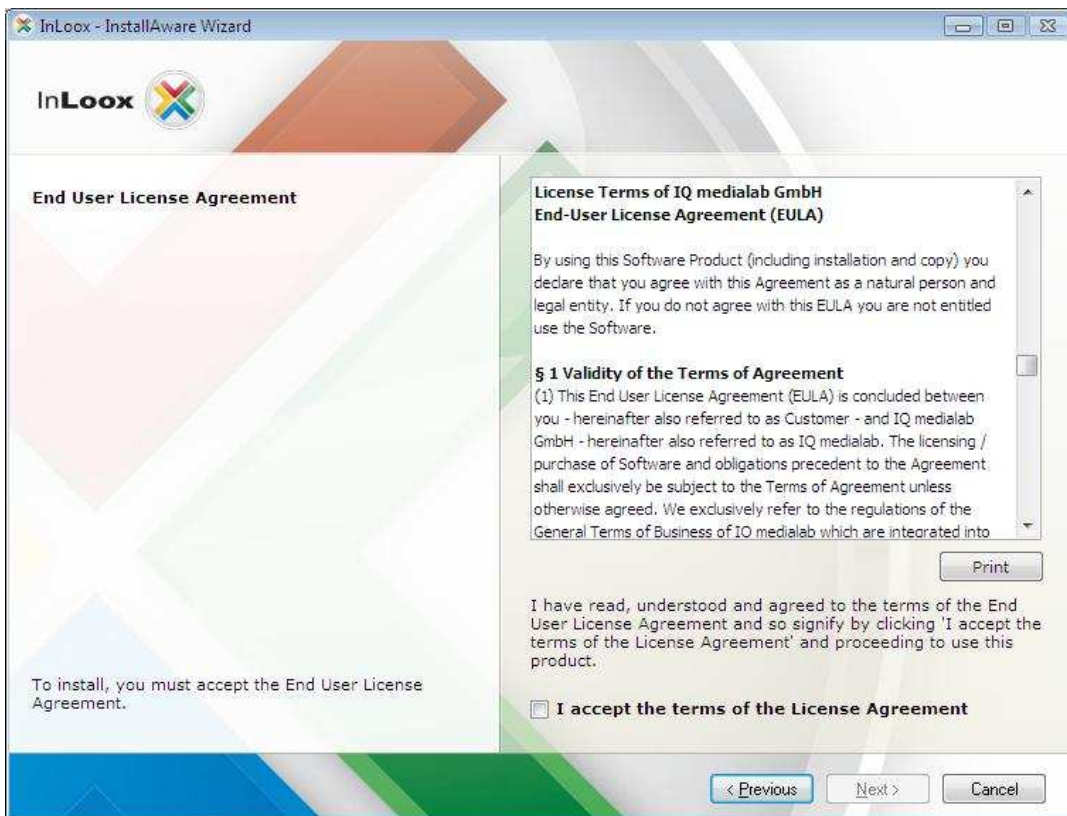
11. Select the path for the connection file and click on **Next**



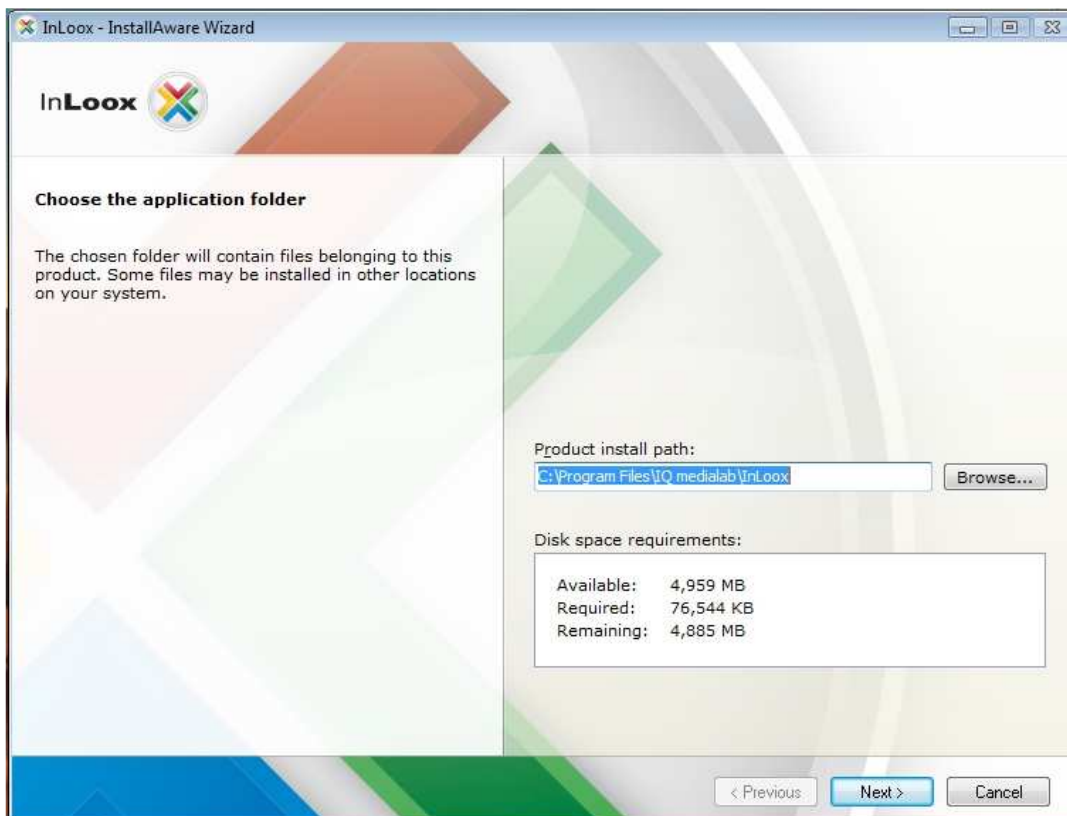
12. Select **Continue with workstation / client installation** and click on **Next**



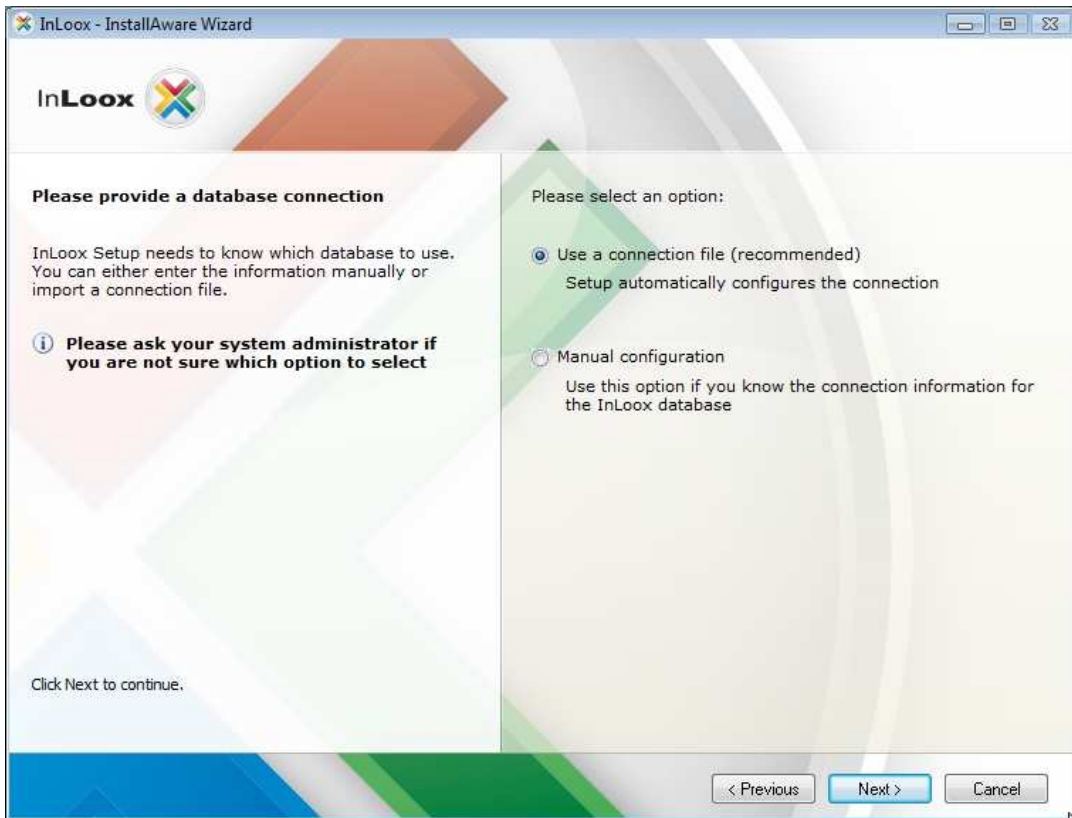
13. Click on *I accept the terms of the License Agreement*, then on *Next*



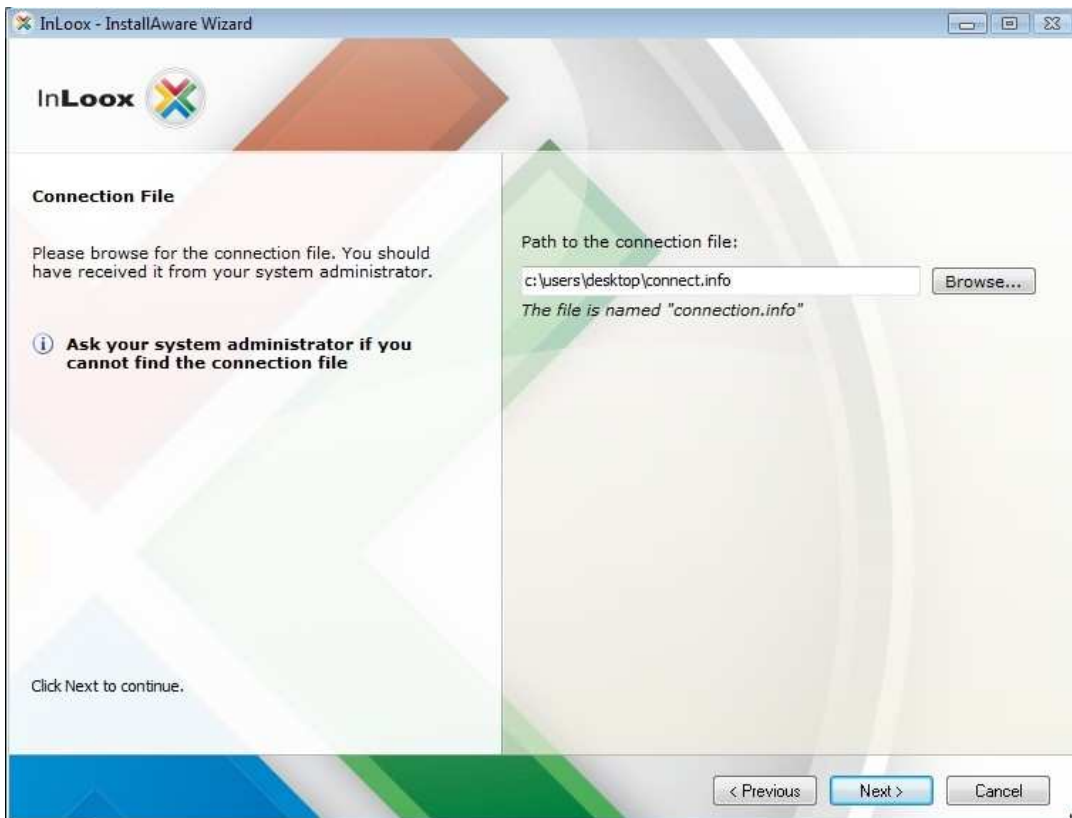
14. If desired change the standard path and click on *Next*



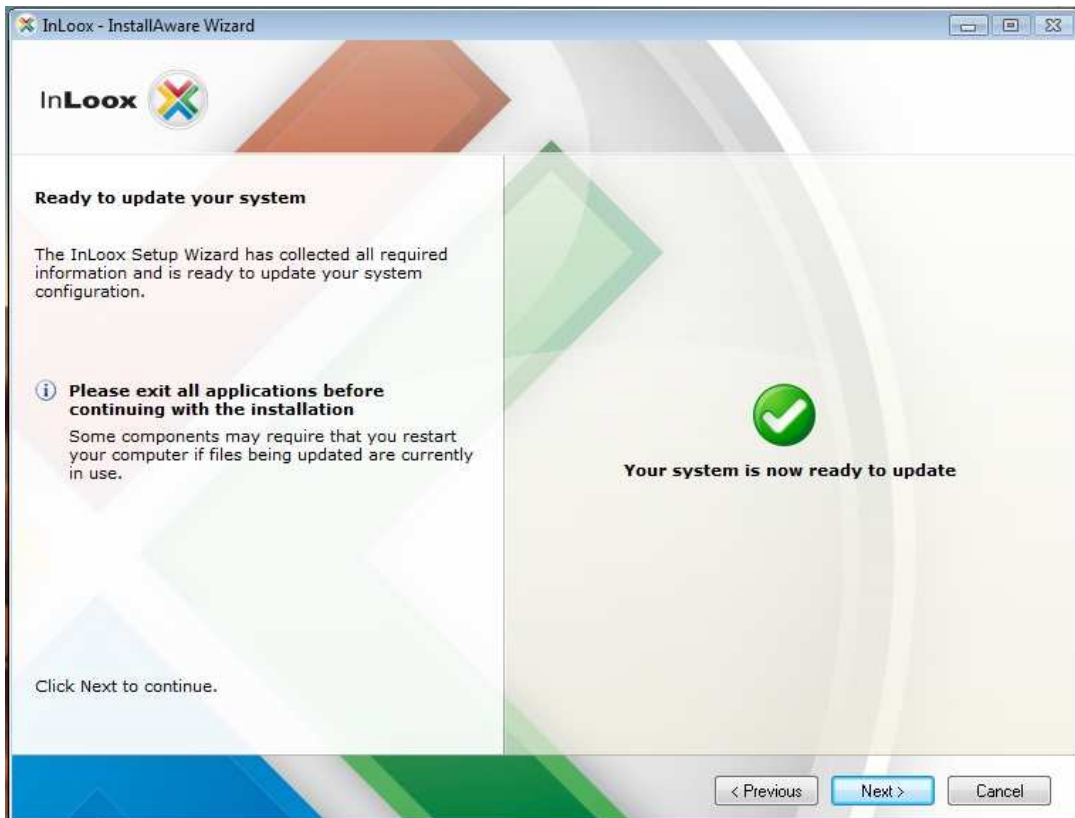
15. Select **Use a connection file (recommended)** and click on **Next**



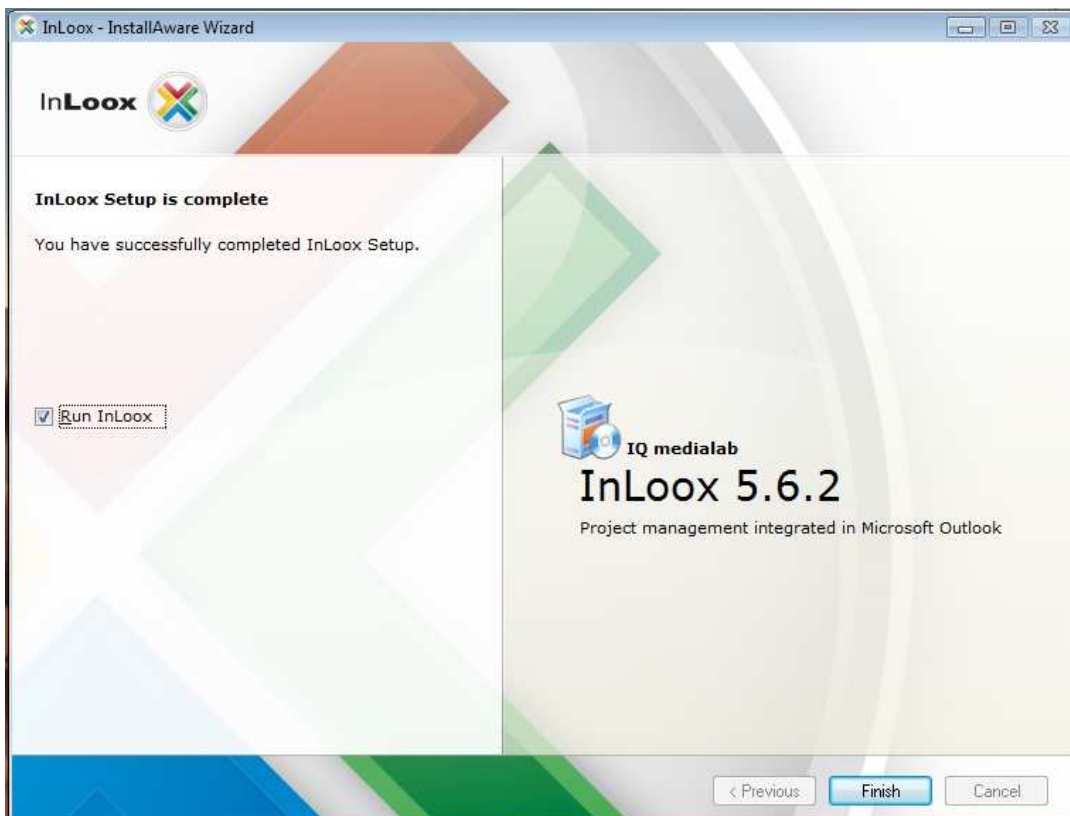
16. Select the path to *connect.info* file if necessary and click on **Next**



17. Click on **Next**



18. Click on **Finish**



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
- Oracle Application Server/Oracle Database: Port 1521
- MySQL Server: Port 3306

Errors related to Microsoft SQL server

Register the appropriate users into the Active directory user group for SQL users.

1. Open: **Start >> All Programs >> Administration >> Active directory user and - computers** on the server
2. Edit the appropriate user (e.g. „John Doe“) or the appropriate user group (e.g. „Coworker selling “)
3. The dialog „*Properties of...* “ appears. Change to tab „*member of* “
4. Click on **Add..** The dialog „*Select Group*“ appears
5. Enter into **object names** the input field

SQLServer2005MSSQLUser (for SQL server 2005) and/or **SQLServer2008MSSQLUser** (for SQL server 2008). Click on **Check name**. The name should be resolved as follows:

SQLServer2005MSSQLUser\$SERVERNAME\$MSSQLSERVER (for SQL server 2005)
SQLServer2008MSSQLUser\$SERVERNAME\$MSSQLSERVER (for SQL server 2008)

The part **SERVERNAME** is in this context the name of the SQL server and/or the primary domain controller (PDC).

6. Click on „OK“ in the opened dialog

You can also configure the access permissions via the SQL Server Management Studio for SQL 2005 and 2008. InLoox supports Windows- and SQL-account logon. Please consider the appropriate guide for configuring the authorizations by Microsoft:

<http://support.microsoft.com/?scid=kb%3Ben-us%3B889615&x=5&y=9>