

Individual InLoox - Adapt Folder Structure for Your Company

An InLoox Whitepaper

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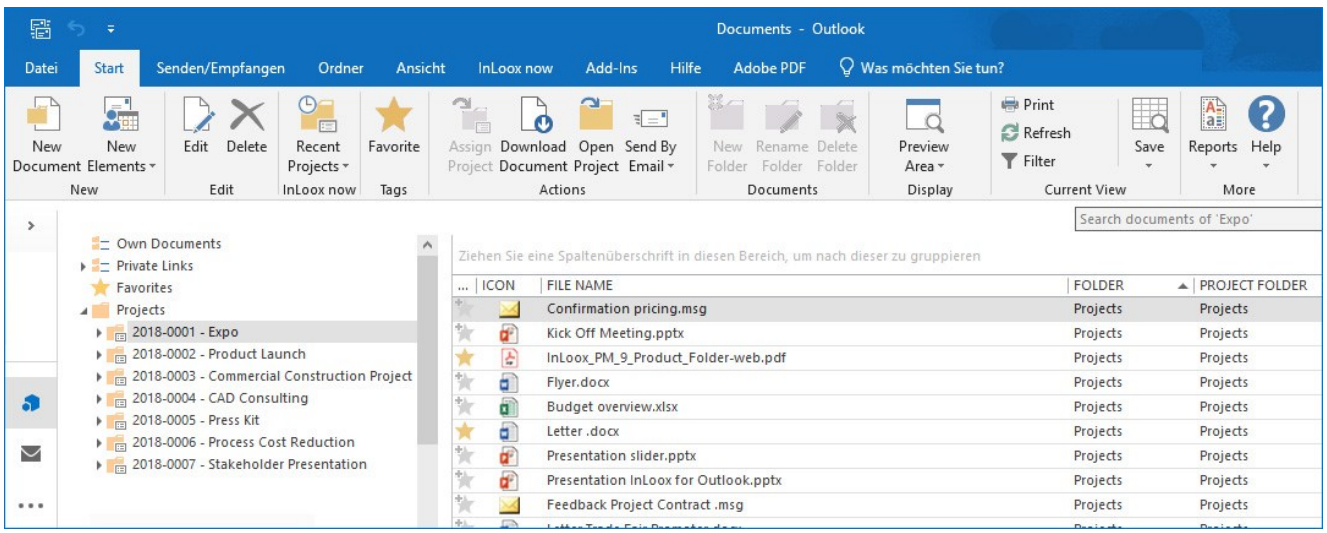
Document Storage in InLoox

InLoox is not only the central platform for task and project management, but also for document storage. Besides the convenient storage of Outlook e-mails, InLoox offers the possibility to adapt the document structure in InLoox to that of your file system. This ensures that everyone who works with InLoox immediately finds their way around the central project document storage.

By separating project documents from project-independent, i.e. personal documents, InLoox users can also store and record documents for their daily business in InLoox – all in one place and clearly structured.

In this whitepaper you will learn how to customize the folder structure in InLoox to your needs and how to customize the automatic creation of project subfolders using rules. With the synchronization between InLoox and your file system and the so-called personal link, we will also introduce you to two useful functions that simplify your daily work and project routine with InLoox.

Note: You define these settings in the InLoox options. For this you need administrator rights.



Folder Structure: InLoox PM vs. InLoox now!

How you adapt the folder structure for InLoox depends on whether you are working with InLoox PM, the On-Premise solution of InLoox, or with InLoox now! the SaaS solution of InLoox.

Document Storage in InLoox PM

In order to modify the document storage in InLoox PM to your needs, you have to decide where your documents should be physically stored, according to which storage structure this should be done and which document subfolders should be created for your InLoox projects.



Document Structure in InLoox now!

For InLoox now! users either work with InLoox to store documents in the InLoox now! cloud, or use Microsoft SharePoint Online. A separate container is created in the cloud for each InLoox now! account, in which the InLoox now! project folder structure can be customized. If Microsoft SharePoint Online is used, the global storage structure can be defined there and then the project folder structure can be adapted.



Customize Folder Path — File Server

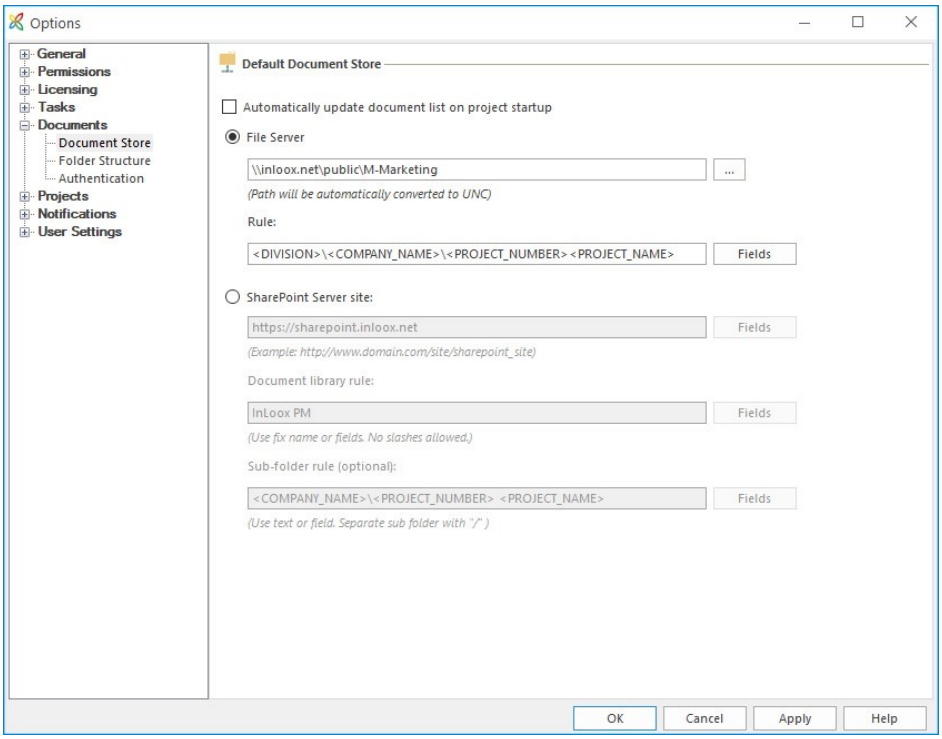
If you are working with a local file server, such as Microsoft File Explorer, specify the folder path where the InLoox project folders are to be created. In the InLoox options, define the **folder path** under D**ocuments**.

If you already have an existing folder structure on your file server, you can specify a rule according to which the InLoox project folders are created. A useful structure would be, for example, the projects according to

- Division
- Client
- Projectnumber + Projectname

to subdivide. To do this, proceed as follows:

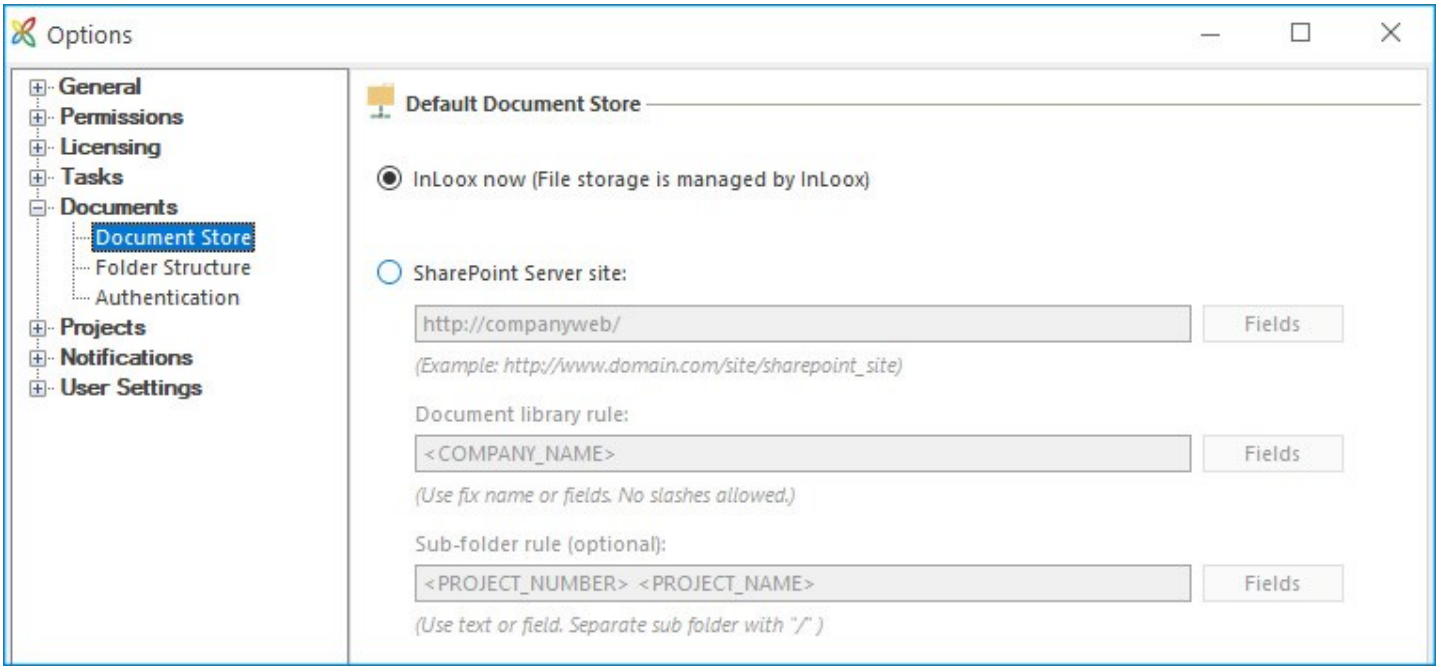
1. Enter the **folder path** of your file server.
2. Click **Fields** next to the entry field.
3. Select the fields you want the folder structure to be based on. Separate subfolders with \.



Note: All fields used for the rule must be filled in on the InLoox management page. If, for example, the "Customer" field in a project is not filled in, the subfolder will not be created because the rule containing this value cannot apply.

Instructions for InLoox now!

If you use InLoox now! project management software as a service, the file store that acts as your default document store is managed by InLoox.

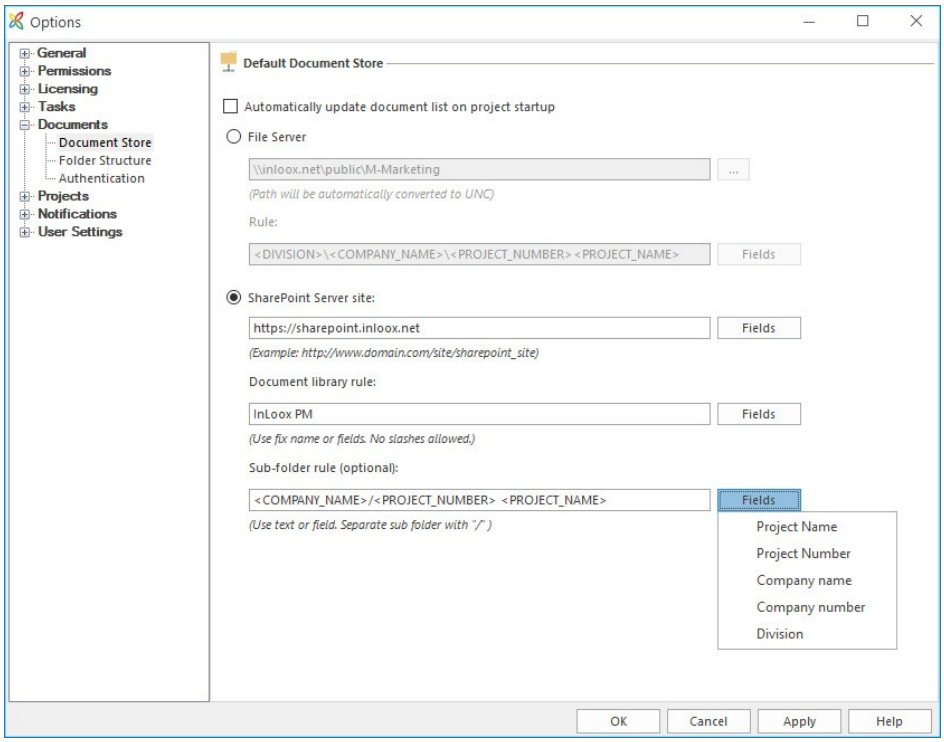


Each InLoox now! account is assigned its own encrypted container, to which only the authorized InLoox now! users of this account have access. The project documents are stored in this container. As soon as a new project is created in InLoox now!, InLoox creates the project folder structure. You define the structure for creating the project subfolders in the next step.

Customize Folder Path — Microsoft SharePoint

If you are using Microsoft SharePoint, select the SharePoint Server site as the default document store for your InLoox project documents.

1. Enter the URL to your **SharePoint Server site**.
2. Specify a **rule** for the SharePoint document library. Enter text or select one of the fields.
3. Specify the **rule for creating the subfolders**. Select the fields you want the folder structure to be based on. Separate subfolders with \.



The advantage of the SharePoint document library is that you can define the file access rights for each library individually. For example, you can create your own library for external service providers, or simply restrict the editing rights and thus control who can access which libraries or folders.

Instructions for InLoox now!

You can also use Microsoft SharePoint in the SaaS version for document management with InLoox now! If you select Microsoft SharePoint Online as the default document store, enter the URL of your SharePoint Server site here as well. To set up the rules for creating the document library, proceed as usual.

Customize Folder Structure of Project Folders

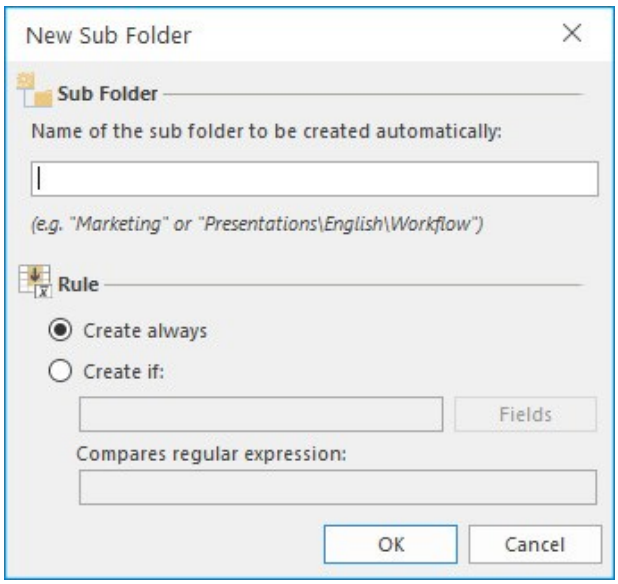
You can specify whether a subfolder should always be created as soon as documents are stored in a project, or whether the subfolder should only be created if a certain rule applies.

A uniform folder structure of the project subfolders allows an easy and fast orientation in all project document folders. New members of a project team can thus quickly find their way around. In addition, the automatic creation of project subfolders saves you the time you would have to spend if you created the subfolders manually.

Create Subfolders

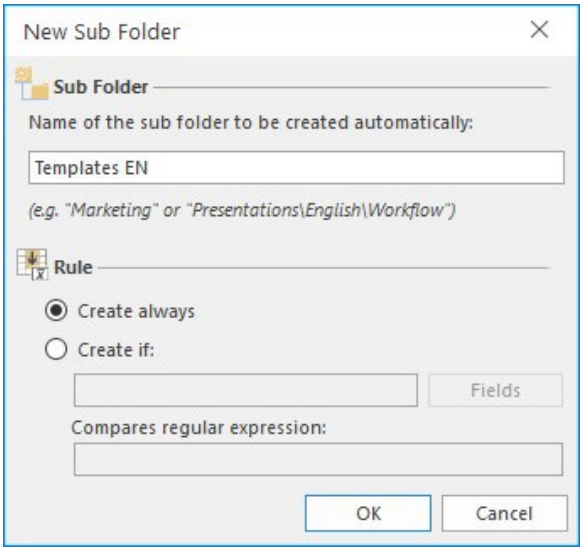
In the InLoox options you will find the **Folder Structure** area under **Documents**.

- Click on **New** to create a new subfolder
- Name the subfolder
- Select whether this subfolder should always be created as soon as a new InLoox project is created.



Beispiel: Subfolder Templates in each Project Folder

For example, it makes sense for each project to contain a subfolder for templates that each project team member can access. So enter the name Templates EN and check **Create Always**.



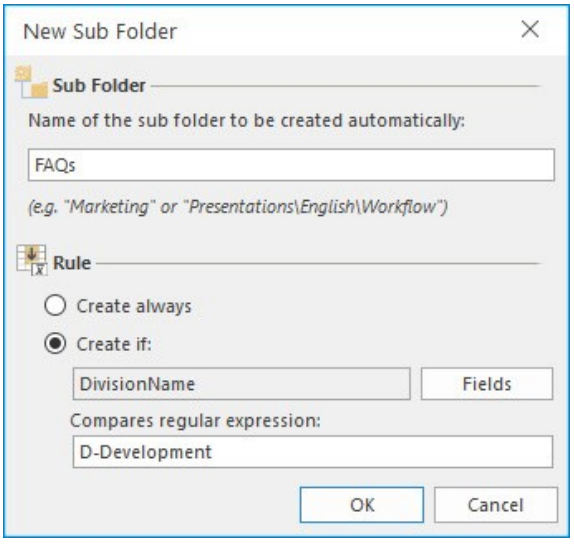
Create Subfolder with Rule

If the subfolder is only to be created under certain conditions, check **Create if**.

- Click **Fields** to specify which field must contain a value for the rule to apply.
- Enter the corresponding regular expression.

Beispiel: Subfolders only in Projects of the Development Department

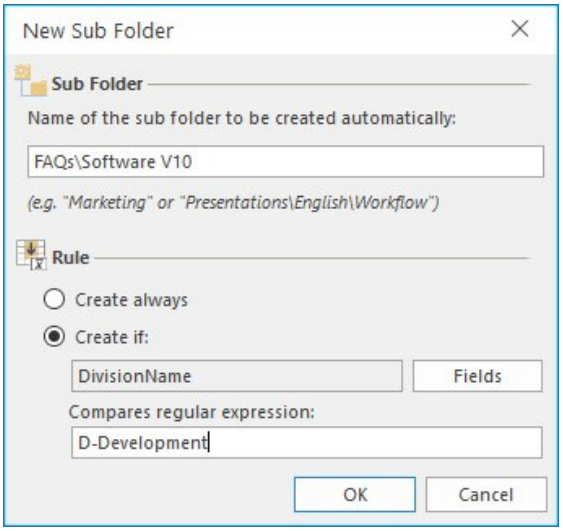
If you only want to create the FAQs subfolder in development department projects, select the Devision field and enter the exact name of the devision as the regular expression. In this case, the name is D-Development.



Beispiel: Create multiple Subfolders

You can also create several subfolders according to one rule. To do this, separate the names of the subfolders with \. Then enter the rule according to which these subfolders are to be created.

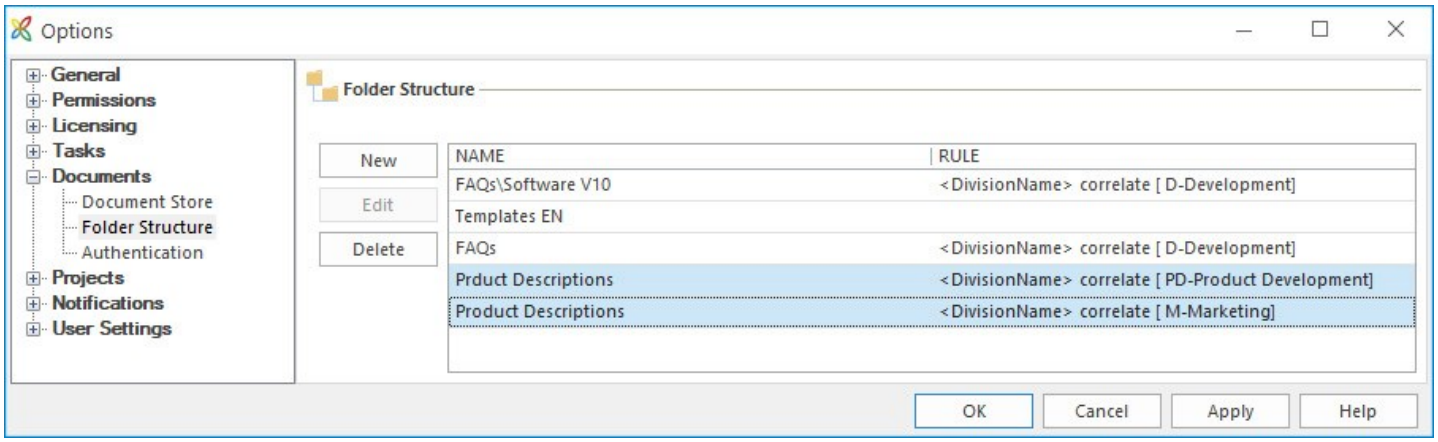
The *FAQs* subfolder and its *Software V10* subfolder are created when the project is assigned to the D-*Development Department*.



Beispiel: Create Subfolder according to OR Rule

You can also specify an OR rule for subfolders. To do this, you define two rules for the same subfolder.

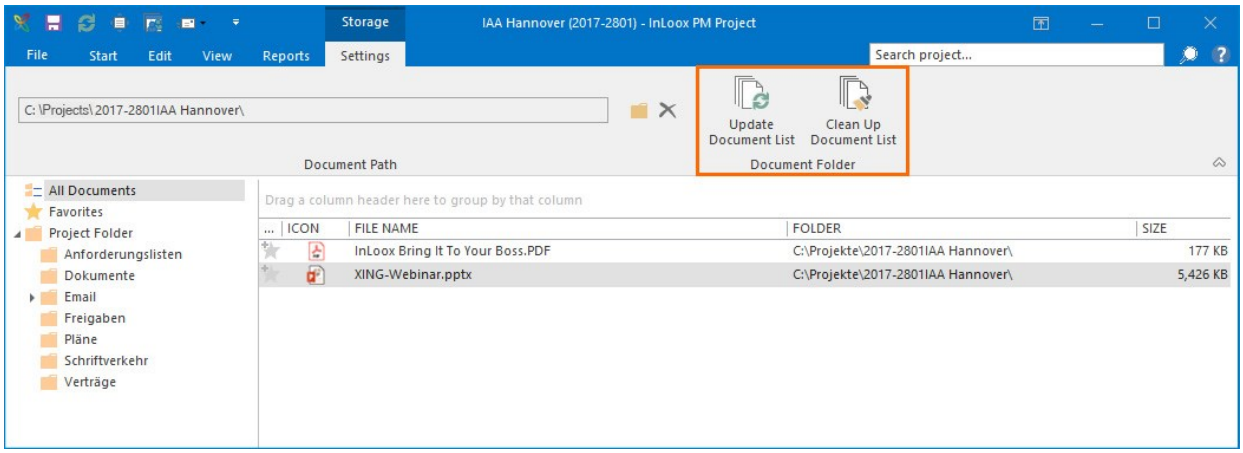
For example, if you always want to create the subfolder *Product Descriptions* for the Product Development and Marketing departments, enter the rule Devision corresponds to *PD-Product Development* and the rule Devision corresponds to *M-Marketing*.



Tips for InLoox Document Storage

Synchronization with the File System

Synchronize InLoox with your file system. You can use it to both clean up and complete the InLoox document repository. Synchronization is always project-specific. Open a project, go to the project documents and click on the Settings tab. In the Document Folder area you will find the commands Import folder contents and Clean document folders.



- If you want to add documents located in the project folders on your file server or SharePoint to InLoox, select **Update Document List.**

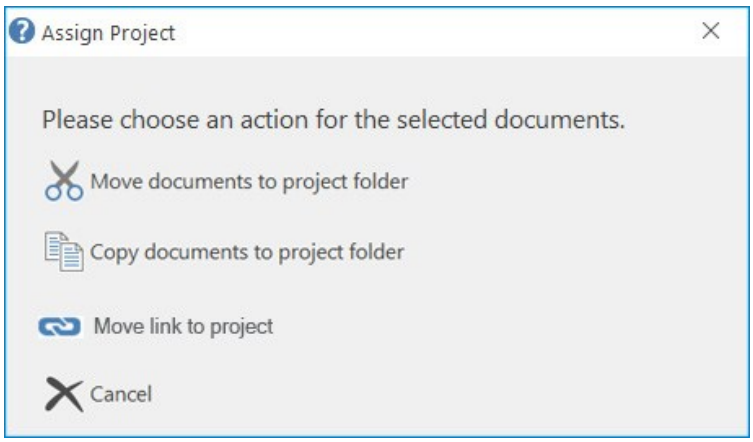
- **Clean Up Document List** means that documents that are no longer in the project folders on your file server or SharePoint will also be removed from the InLoox project folder. This way you avoid outdated versions in your InLoox project document folder. This function only applies to InLoox PM.

Synchronization only takes place from file storage system to InLoox. Changes are only made in the project folder where you gave the synchronization command. All other project folders remain untouched.

Private Links in InLoox PM

If you want to use InLoox for your own documents, we recommend that you create a so-called personal link. This allows you to create a link collection in a separate folder to documents that you have saved locally on your computer. This has the advantage that you can edit the document locally until it has reached its final status and you want to assign it to a project or project task.

As soon as you assign the document to a project, InLoox gives you 3 options:



Move documents to project folder

The document is moved from the local storage location in InLoox to the linked file server or SharePoint.

Copy documents to project folder

The document is copied from the local storage location in InLoox to the linked file server or SharePoint.

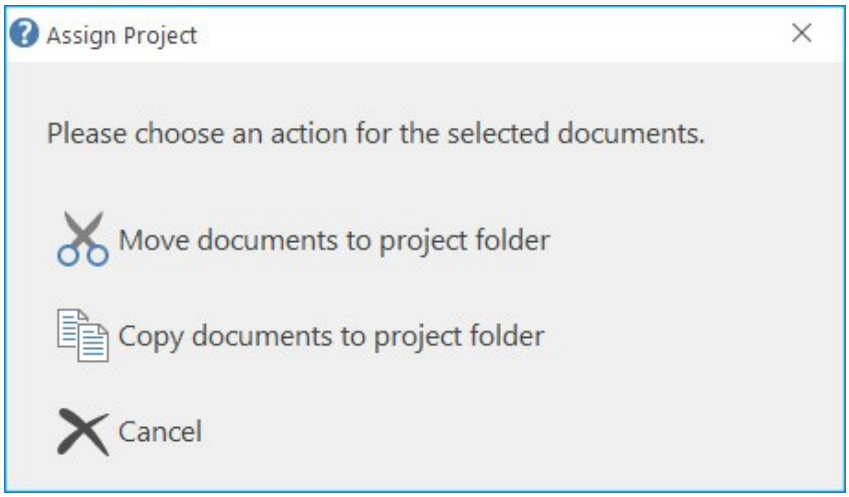
Move link to project

The document remains stored locally on your device. Only the link to it is stored in the InLoox project folder. This allows you to restrict access to the document if necessary. And you can update the document locally.

Private Links in InLoox now!

If you are working with InLoox now!, you cannot store links to local documents in the Personal Links folder. Instead, you can upload your own documents to the InLoox cloud. As long as you do not assign these documents to a project, only you have access to these documents.

However, InLoox now! gives you the two project assignment options:



Move documents to project folder

The document is moved from your Personal Shortcuts folder to the Project folder.

Copy documents to project folder

The document is only stored as a copy in the InLoox project folder. It is also stored in your Personal Shortcut folder.

About InLoox

InLoox was founded in 1999 and develops project management solutions integrated in Microsoft Outlook that simplify and accelerate business processes. The convenient Outlook integration makes InLoox the central platform for project and day-to-day business. Its ease of use makes everyday work easier and project managers, teams and decision-makers can rely on InLoox's powerful planning, controlling and monitoring functions - on the desktop, on the web and on their smartphones.

More than 60,000 users in over 65 countries trust InLoox. InLoox customers include AVIS, CHRIST Wash Systems, German Red Cross, LIEBHERR, Novartis, Pentax Europe, STOROpack, SEAT, Siemens, US Airways, Verizon and many more. InLoox is based in Munich, Germany and has an office in San Francisco, USA.

Contact:

Address: Walter-Gropius-Str. 17
D-80802 Munich

Phone: +49 (0) 89 358 99 88 - 0
Fax: +49 (0) 89 358 99 88 - 99

E-Mail: info@inloox.com
Website: https://inloox.com

InLoox 30-day **free** trial:

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