

# How-to: Automated Workflows & Processes

## How to work more efficiently with InLoox & Power Automate

An InLoox Whitepaper

2nd edition

2021

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# Introduction: Automated Workflows

Studies have found out that working people receive an average of about 21 emails a day. 30% even receive more than 30 emails a day. Let's assume that you spend an average of 3 minutes on each email—that‘s at least 63 minutes a day. This is definitely not the most efficient way to work. Artificial intelligence and machine learning are the buzzwords of the year and even if machines can't yet take over 100% of the task of replying to emails – although Autofill is already very accurate – it is possible to automate certain processes. What do you do when a new email arrives in your Outlook inbox? Most likely: Click, read, reply or file? Take this action 10, 100 or 1000 times and these few clicks, these few seconds and minutes add up considerably. We "waste" valuable hours a day on routine tasks. What if you could automate the last step: When an email arrives with a certain subject (e.g. project name or number), this email will automatically be saved in the project folder. Or you can go one step further: An InLoox task is generated directly from the email and the email text is inserted as a task note. This saves you a few clicks and valuable time.

This is where automated workflows come into play. In organizational theory, workflow is referred to as the "spatial and temporal sequence of functionally, physically or technically related work processes at a workstation". In this white paper we will deal with the personal and project-related workflow when working with InLoox. We will show you how you can automate your personal work processes, but also how you can automate certain project processes, such as project proposals – completely without programming skills.

The program Power Autoamte from Microsoft makes this possible. Microsoft Flow is a workflow application with which users can easily automate recurring actions and processes via drag and drop. Unlike e.g. QuickSteps or rules in Outlook, Power Automate can be used to connect different services and applications with each other. InLoox offers an open Application Programming Interface (API) that enables data exchange between InLoox and other systems (e.g. SAP, ERP, CRM, etc.). This allows users to automate certain InLoox processes in Microsoft Flow.



## Advantages

Previously, it was only possible to create such workflows with very high developer effort, which goes hand in hand with high costs. Normally, you would have to develop and write (or hire someone to write) a program especially for this purpose. These types of projects are expensive, maintenance -intensive, inflexible and require a high degree of coordination.

With Power Automate, personal workflows can be quickly automated and even changes can be easily adapted.

**NOTE: The steps described here apply to Office 365 in combination with InLoox now!**



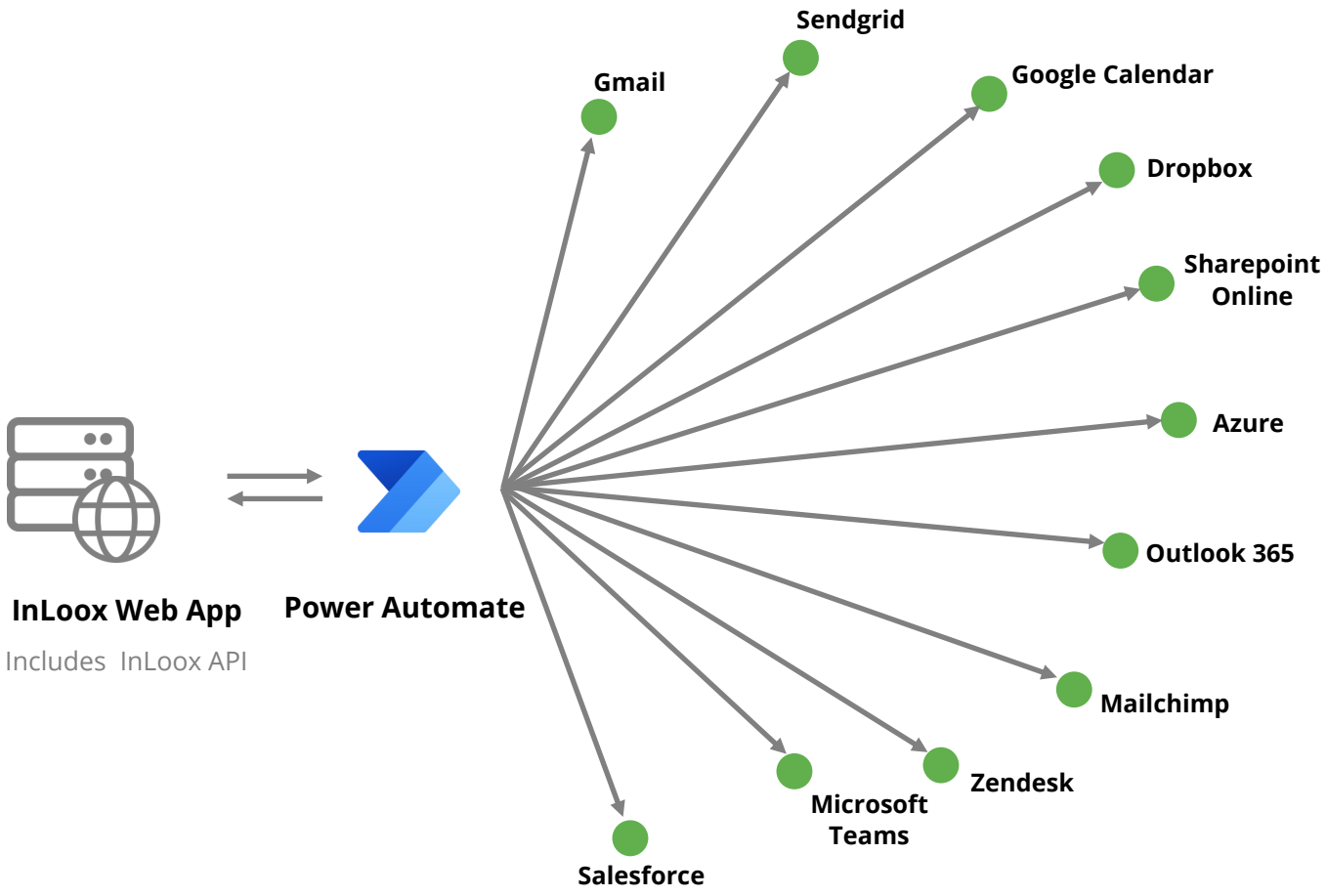
# Requirements & preparations

## Requirements

To be able to create automated InLoox workflows with Microsoft Power Automate, you need the **InLoox Web Application Server**. This server is automatically included in InLoox now!, with InLoox PM it is only available in the Enterprise Version in combination with a Web User License. The documentation for the InLoox API can be found here: [InLoox API]

You will also need an **Office 365 account**.

You can register for Microsoft Power Automate for free: [Microsoft Power Automate]



# Preparations

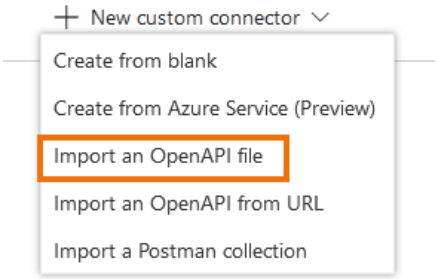
Before you can create a Flow for InLoox, you must first create the InLoox Connector in Power Automate. Follow these steps to create the InLoox Connector in Power Automate:

Download the **InLoox package** first: Download and unzip it. Included in the package are the following:

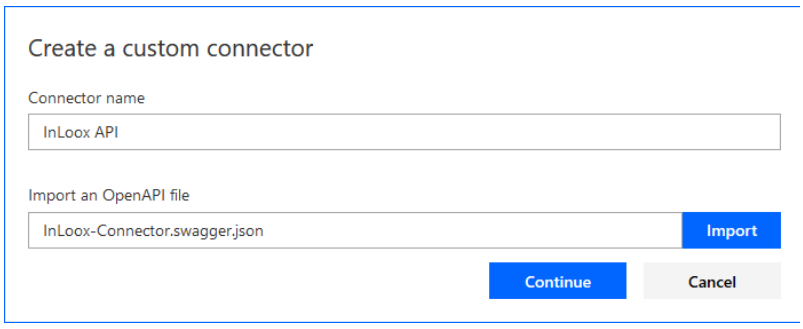
- Complete flow templates for all 5 scenarios
- The InLoox API Connector
- A text file with the URL where you can retrieve the authentication token (API key)
- A text file with the URL that you can use to get the ContactID of an InLoox user (relevant for scenario 5)
- InLoox Logo as .png

**Creating a custom connector**

1. Go to **portal.office.com**
2. Open **Power Automate**
3. In the side panel on the left, click on **Data** >> **Custom connectors**
4. Click on **New custom connector** and select **Import an OpenAPI file**




5. Name the connector, e.g. *InLoox API* and click **Import**: Select the **InLoox-Connector.swagger.json** file that is included in the InLoox package

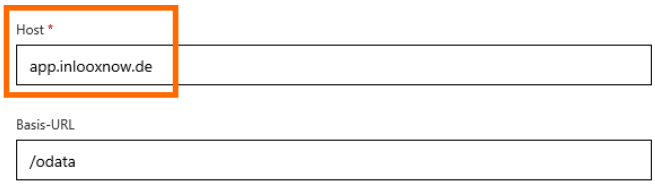


6. Click on **Continue**

7. In the next window you can edit the **General information**

   A. (optional) Add an icon to the connector, e.g. the InLoox logo. Simply click on **Upload** and select an image file. The InLoox package also includes the InLoox logo for your convenience.

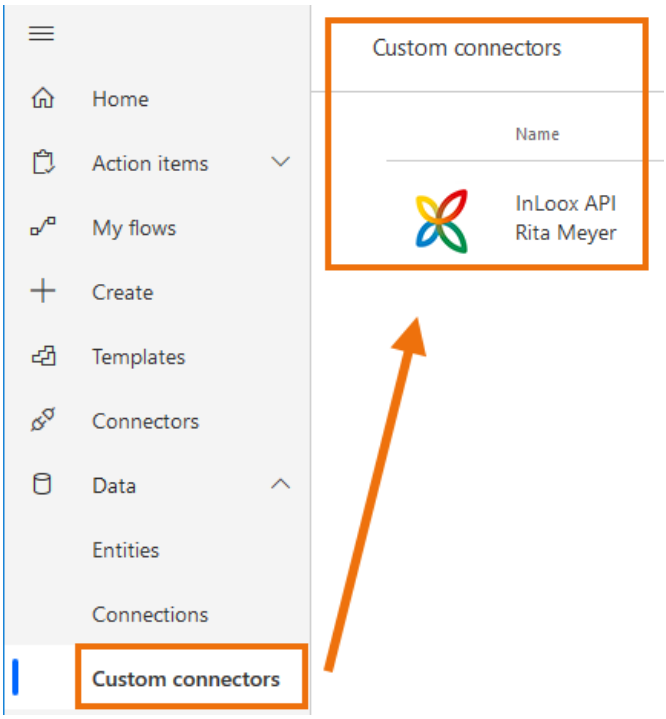
   B. **Host**: If you are using *InLoox now!*, you don't need to edit anything here because the link to the InLoox Web App is always automatically added. If you are using *InLoox PM*: Enter the URL to your Web Application Server.




8. Go to the next page: The *Security* page is completed automatically, i.e. you can jump to the next page, which is already completely filled in. You can therefore simply click on **Create connector**




You can find the saved InLoox Connector under **Data** in the sidepanel under **Custom connectors**



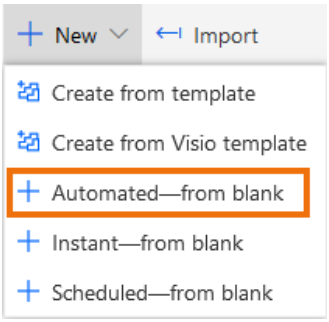
# Scenario 1: New Outlook task when an email is flagged

The first scenario is intended as an exercise so that you can familiarize yourself with the Power Automate user interface and workflows. So we'll start with a simple flow in Outlook:

**When flagging an email in Outlook, an Outlook task should be created automatically as well.**

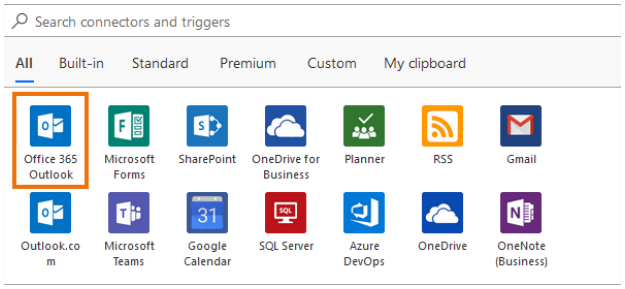
1. Open **portal.office.com** and go to **Power Automate**

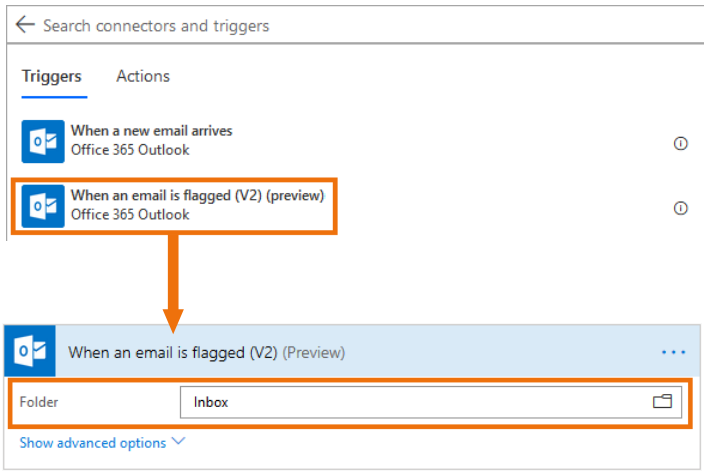
2. Click on **My flows** in the side panel




3. Click on New on the top left side and select **Automated—from blank** from the dropdown menu.

4. Now select a **Connector** and a **Trigger**, i.e. which action in which system should trigger the workflow? In our case, select *Office 365 Outlook* as Connector. And *When an email is flagged* as the trigger.

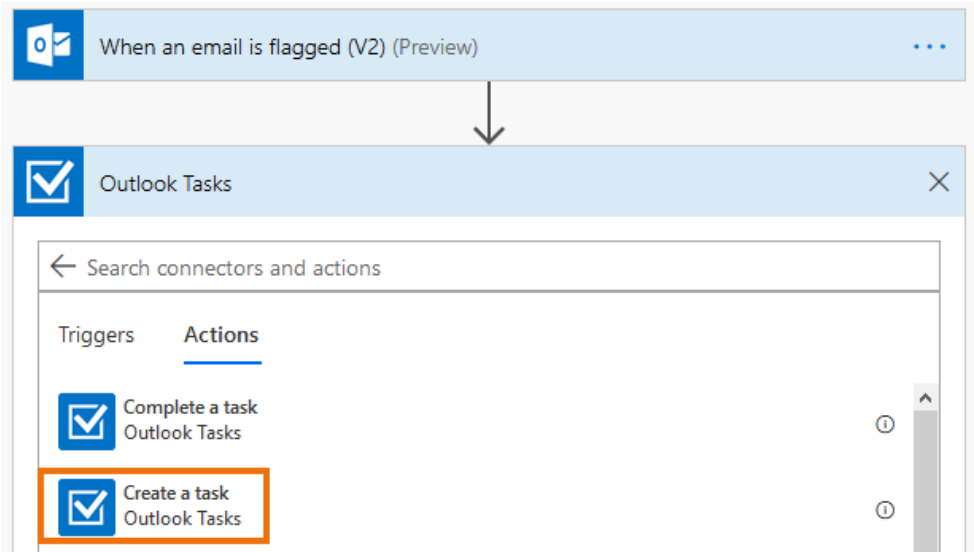


6. In the next window, you can now add further steps or actions to your flow. This means: What should happen after you have flagged an email in your inbox? The Inbox is selected as the default folder, but you can also select another folder.

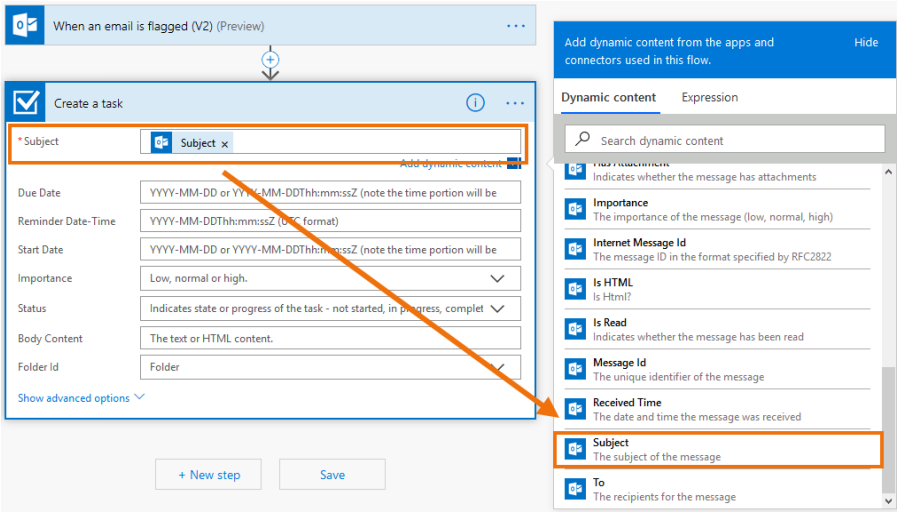
7. Click on + **New step**

8. Select **Outlook Tasks** as the connector



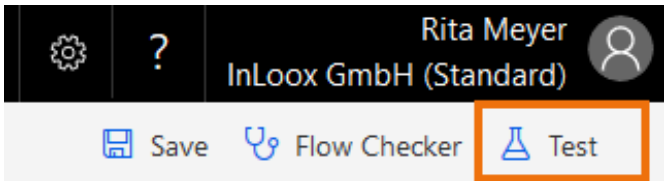

Select **Create a task**. Outlook might require you to login again to connect to Outlook tasks. Click on *Sign in* and sign into your acount. Accept the requested permissions.

9. Under Create task, click on the **subject field** which determines the name of our task. In our case, we will use the subject of the email. To do this, simply click on *Subject* in the drop-down list and it will be added to the subject field automatically.

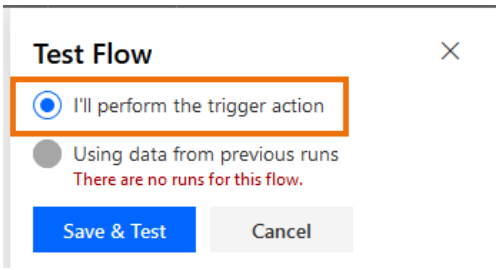



10. Click on **Save**

11. Click **Test** to verify that your flow is working correctly.

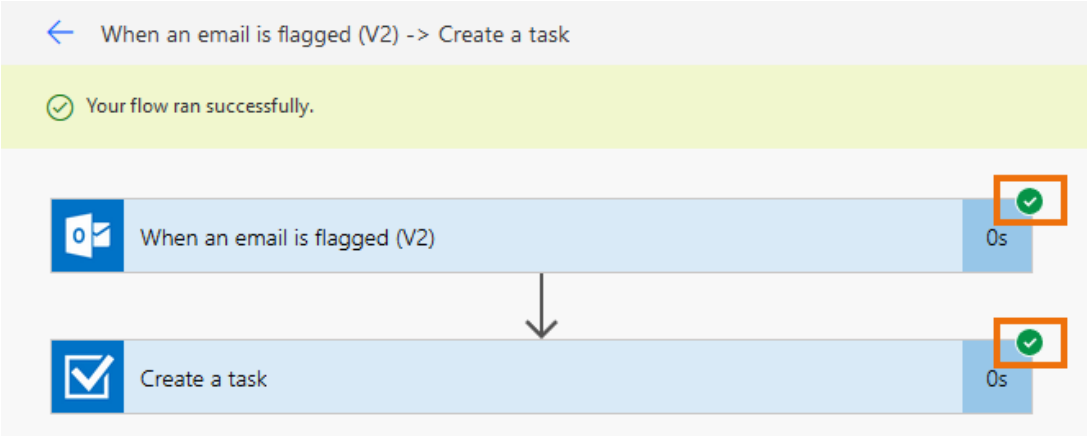



12. Select **I'll perform the trigger action** to execute the trigger manually.




Flag an email in your inbox and wait until the message **Your flow ran successfully** appears.

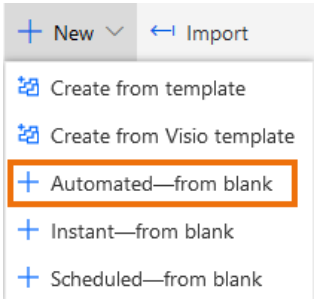
You have now successfully created a flow. Outlook tasks are automatically created from emails that you flag in your Inbox.



# Scenario 2: New InLoox task with a note when an email is flagged

You can easily and quickly turn an email into an InLoox tasks via the Outlook ribbon, but there's an even easier way: When you flag an email, an InLoox task will automatically be generated and the email body will be saved as a task note.

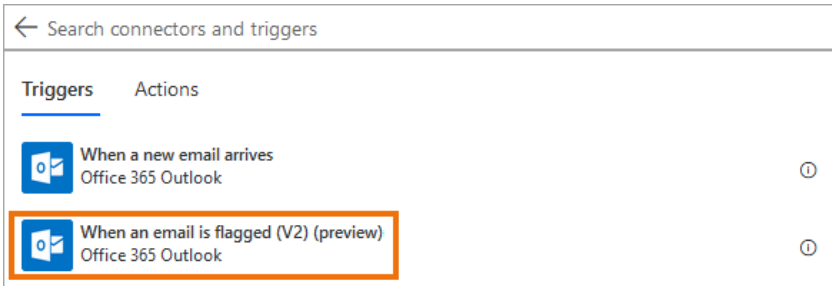
1. Go to **portal.office.com**
2. Open **Power Automate**
3. Click on **My Flows** in the side panel on the left




4. Click on **New** on the top left side and select **Automated—from blank** from the dropdown menu
5. Click on **Skip** in the next window
6. Now select a **Connector** and a **Trigger** :

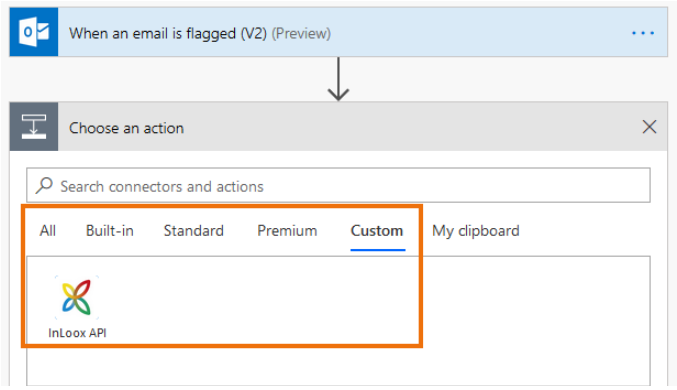
   Connector: **Office 365 Outlook**

   Trigger: **When an email is flagged (V2) (preview)**

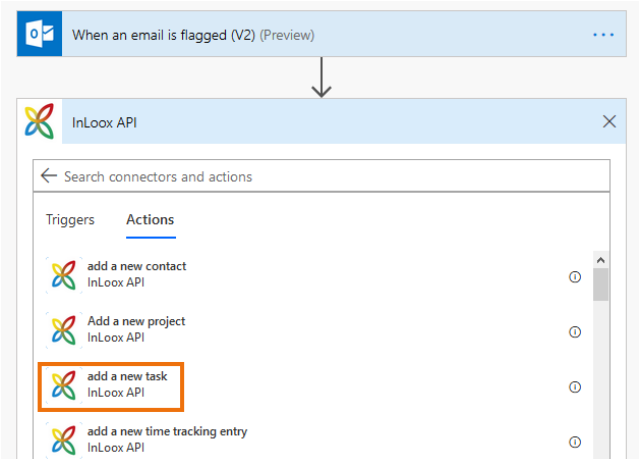



7. Click + **New Step**

8. Click on **Custom** and select the **InLoox Connector**




9. Select the following InLoox action: ***add a new task***

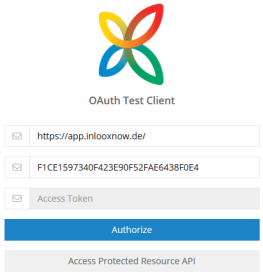



10. You now have to enter the API key so that Flow can connect to your InLoox account/InLoox database. You only have to do this step once, i.e. you do not have to perform this step again for the next flow scenarios. **Here's how to generate your API key:**

A. Open the following link in a new tab in your browser:

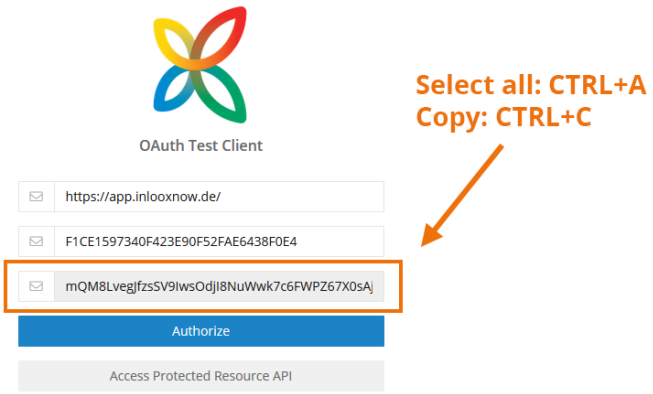
[https://app.inlooxnow.de/tests/oauth2](https://app.inlooxnow.de/tests/oauth2) (you also find this link in the InLoox package in the text file named „URL to fetch token" )

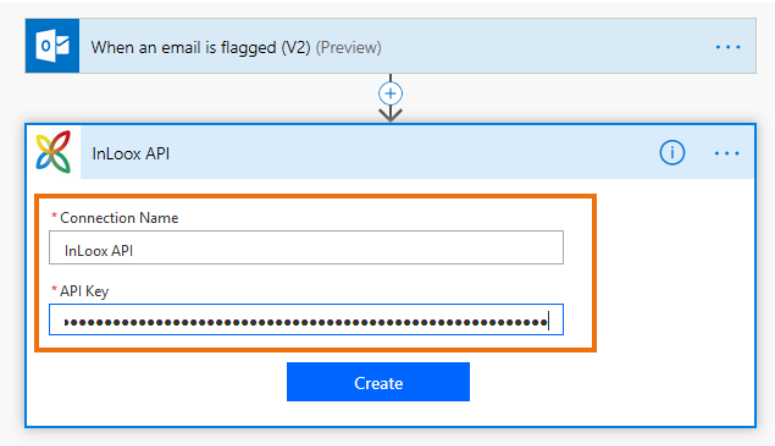


B. Click on **Authorize.** If you're already logged in to InLoox Web App, you can simply close the login window again.
If you are not yet logged in, please log in and close the window after successful authorization.
**IMPORTANT**: If you have multiple InLoox now! accounts, please ensure that you are logged in to the correct account. Read here on how to switch between InLoox now! accounts in InLoox Web App: Switch between InLoox now! accounts
After having switched to the right account, refresh the authorization page and click Authorize again to get the correct API key.

C. Now select the API key with CTRL+A (so you can be sure to copy the complete key) and copy it (CTRL+C). Go back to Flow and insert the key into the field **API key**.




D. Click on **Create**

11. You can now edit the InLoox action

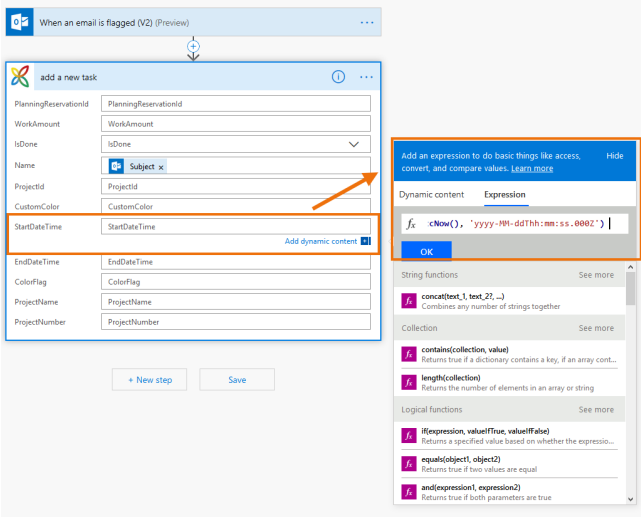
**Task name**: Subject

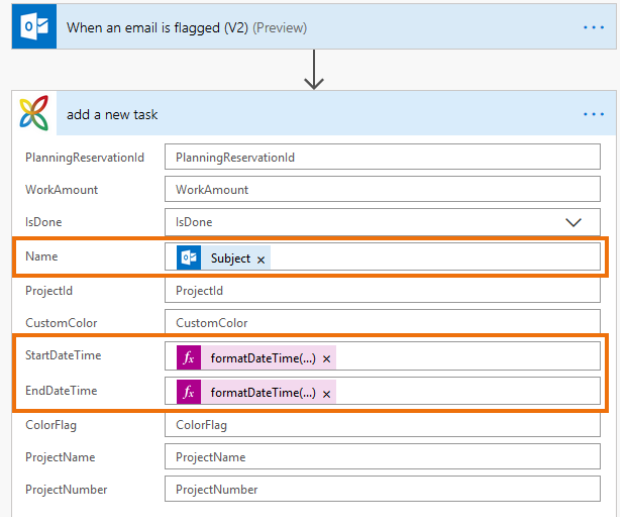
**StartDateTime:** Expresion >> enter the following expression, so the date will be displayed correctly, and confirm with OK:

@{formatDateTime(utcNow(), 'yyyy-MM-ddThh:mm:ss.000Z')}

**EndDateTime:** Expression >> enter the following expression and confirm with OK:

@{formatDateTime(utcNow(), 'yyyy-MM-ddThh:mm:ss.000Z')}



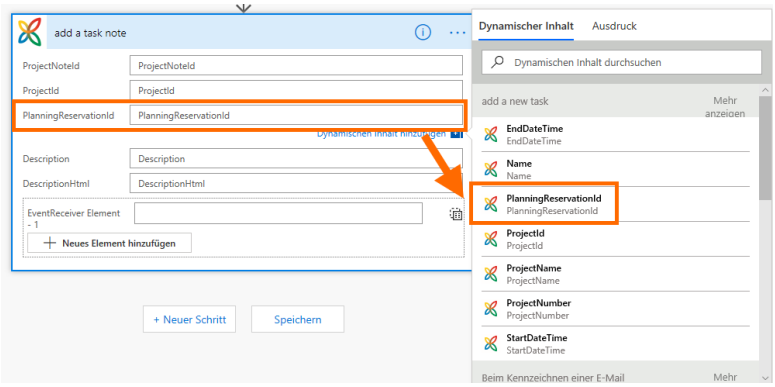


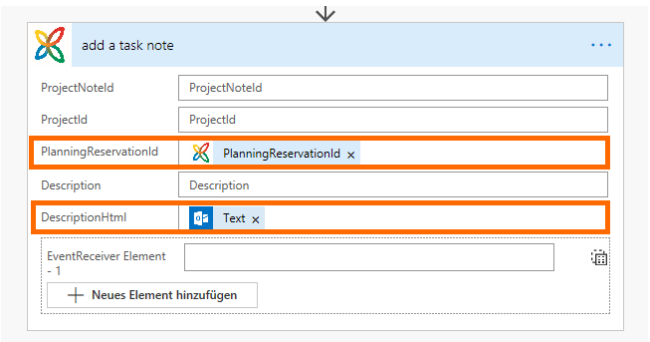

12. Click + **New Step**

13. Click on Custom and select the **InLoox Connector,** then select the following InLoox action: **add a task note**

A. Insert the content **PlanningReservationID** into the field **PlanningReservationID** (this is the primary key of the task that links the task and the corresponding task note to each other)

B. Insert the content **Body** (= email body text) into the field **DescriptionHTML**

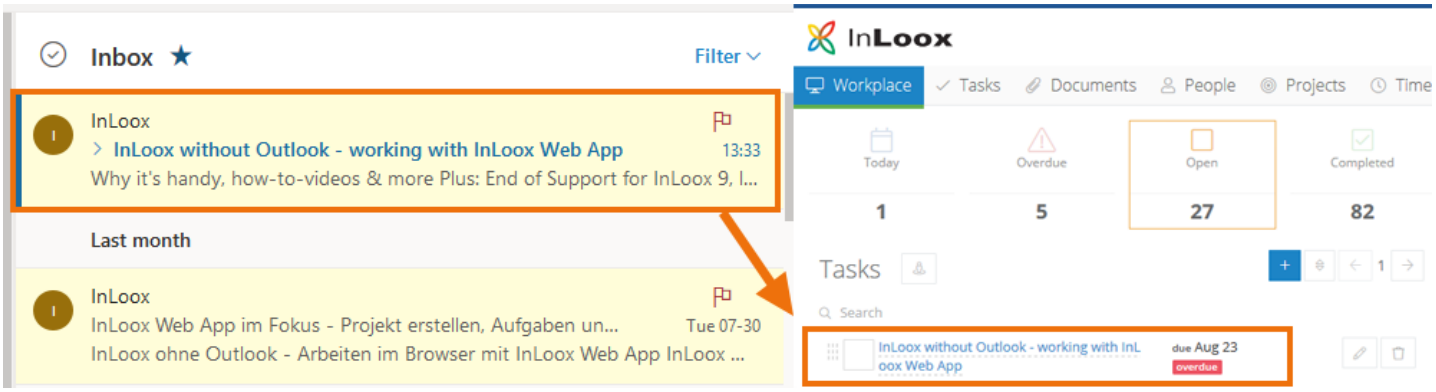





14. Click on **Save**

15. Click on **Test** to check whether your Flow works correctly.

Select **I'll perform the trigger action** to execute the trigger manually. Flag an email in your inbox and wait until the message **Your flow ran successfully** appears. You will now see a new task in InLoox with the email body as a task note:



# Scenario 3: New InLoox project with project note when a new email arrives

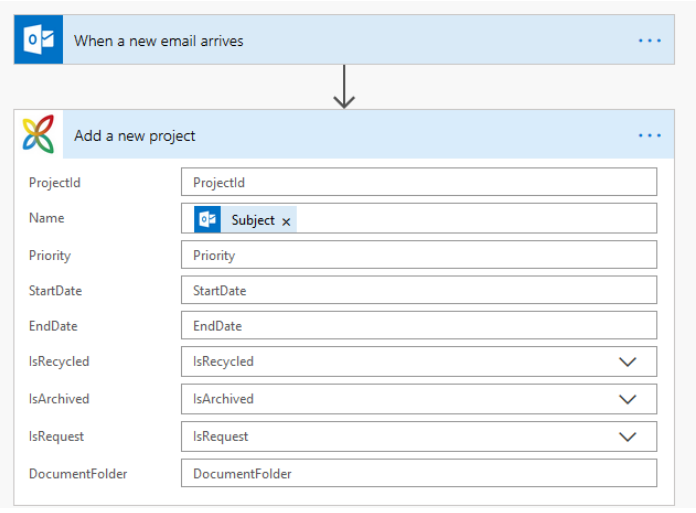
In the third scenario, we will show you how to automatically create a new project from an incoming email. In addition, the email text is saved as a project note:

1. Go to **portal.office.com**
2. Open **Power Automate**
3. Click on **My Flows** in the sidepanel on the left
4. Click on **New** on the top left side and select **Automated—from blank** from the dropdown menu
5. Click on **Skip** in the next window
6. Now select a **Connector** and a **Trigger** :

   Connector: **Office 365 Outlook**

   Trigger: **When a new email arrivies**
7. Click + **New Step**
8. Click on **Custom** and select the **InLoox Connector**. Select the following InLoox action: ***Add a new project***

Add the dynamic content **Subject** into the field **Name** so that the name of the project will automatically be

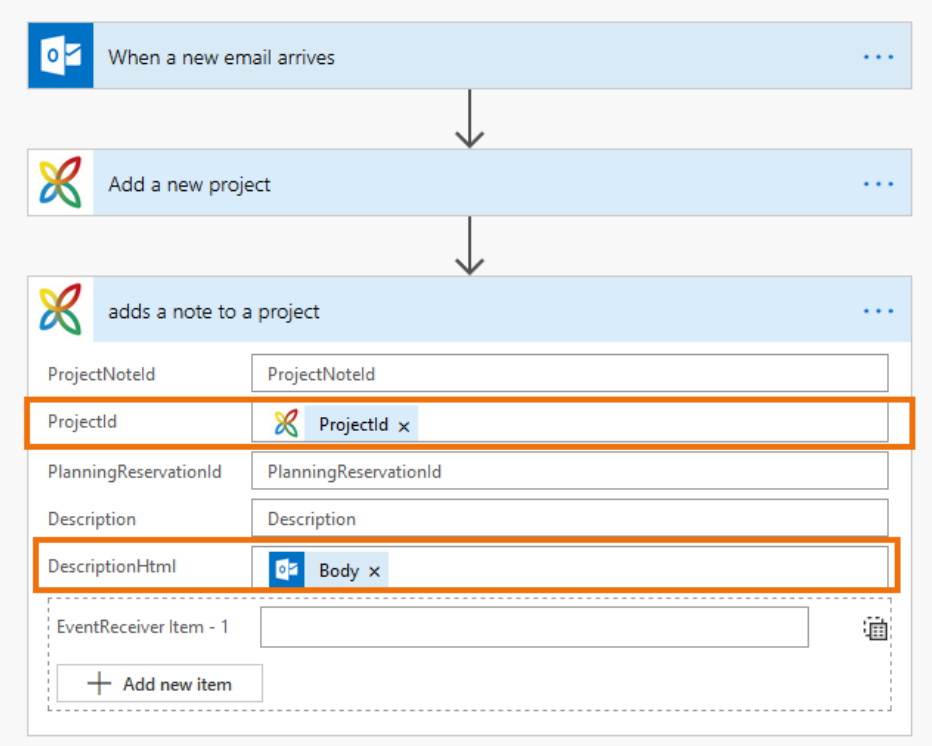



generated from the email subject.

9. Click on + **New step**

10. Click on **Custom** and select the **InLoox Connector** again. Select another InLoox action: ***add a new project***

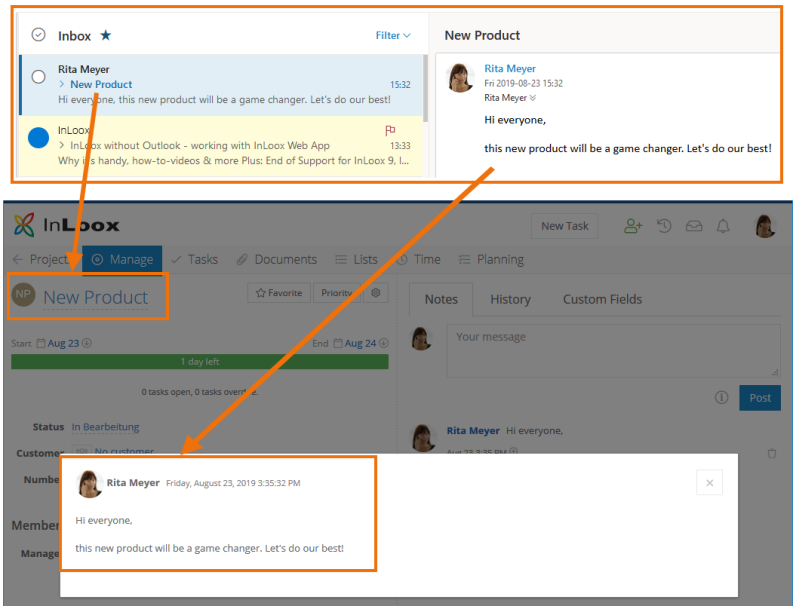
    A. Add the content **ProjectId** to the **field ProjectId**. This is necessary to ensure that the note can be correctly connected to the newly created project.




    B. Add the content **Body** into the **field DescriptionHtml**

11. Click **Save**

12. Click on **Test** to check whether your flow works correctly. Select **I'll perform the trigger action** to execute the trigger manually. Send yourself an email and wait until the message **Your flow ran successfully** appears.



# Scenario 4: InLoox project proposal when an email arrives

Based on scenario 3, we'll show you in the fourth scenario how you can automatically create a project proposal in InLoox when an email arrives. For this we need an intermediate step, because not all incoming emails should become project proposals. A project proposal should only be created when an email arrives in the *Project proposals* folder:

1. Create a folder in Outlook with the name ***Project Proposals***.

2. Now create a rule that says that incoming emails with „Project proposal" in the subject line should automatically be moved into the folder „Project Proposals":

   **Outlook Desktop:** File >> Manage Rules and Alerts >> New Rule >> Apply rule on messages I receive >> with specific words in the subject of body – specify words to search for in the body or subject: in our case, e.g. „project proposal" and „project proposals". Entering similar phrases or even typos will ensure that all relevant emails are moved to the right folder. >> Move it to the specified folder – select the folder „Project proposals" as the destination folder >> Save the rule by clicking on ***Finish***

   **Outlook Web App:** Click on the gear wheel on the upper right-hand side >> Mail >> Rules >> +Add new rule>> Define the rule: All incoming emails with „project proposal" in the subject line should automatically be moved to the folder „Project proposals"

## Now you can create your flow:

1. Go to **portal.office.com**

2. Open **Power Automate**

3. Click on **My flows** in the sidepanel on the left

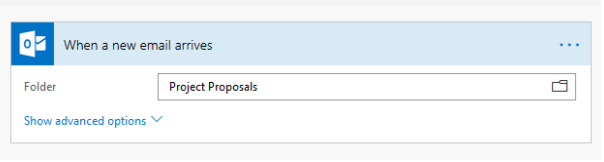
4. Click on **New** on the top left side and select **Automated—from blank** from the dropdown menu
5. Click on **Skip** in the next window

6. Select a **Connector** and a **Trigger** :

   **Connector**: Office 365 Outlook

   **Trigger**: When a new email arrives

   Select the folder *„Project proposals"*




7. Click on + **New Step**

8. Click on **Custom** and select the **InLoox Connector** again. Select another InLoox action: ***Add a new project***

   Add the dynamic content **Subject** to the **field Name**, i.e. the subject of the mail will be the name of the proposed project.

9. To add a reviewer, i.e. someone who can approve or deny the proposal, click on + **New Step**.

10. Click on **Custom** and select the **InLoox Connector** again. Select another InLoox action: ***Post a new entitiy to EntitySet projectcontactview***

Enter in the field **ContactId** the ID of the person who should receive the project proposal (the reviewer).

Here's how to find the right ID:

A. Copy the following URL into a new tab in your internet browser:

https://app.inlooxnow.de/odata/contact?$select=ContactId,%20Email&access_token=XXXXXXXXXXXXX

Instead of the XXXXX add your API key (see Chapter 4: Scenario 2)

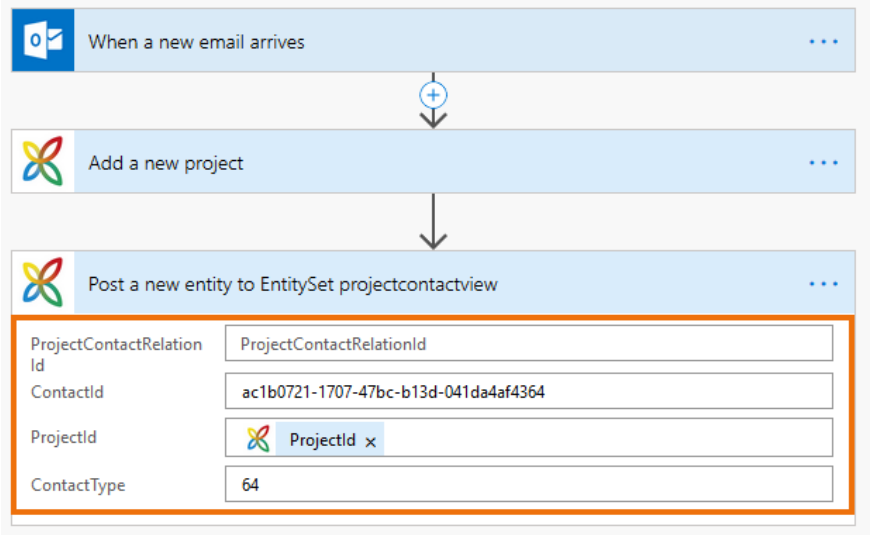



B. Now you'll get a list of InLoox people and their **ContactId**. Copy the ContactId (without the quotationmarks) and paste it into the field ContactId in Flow.



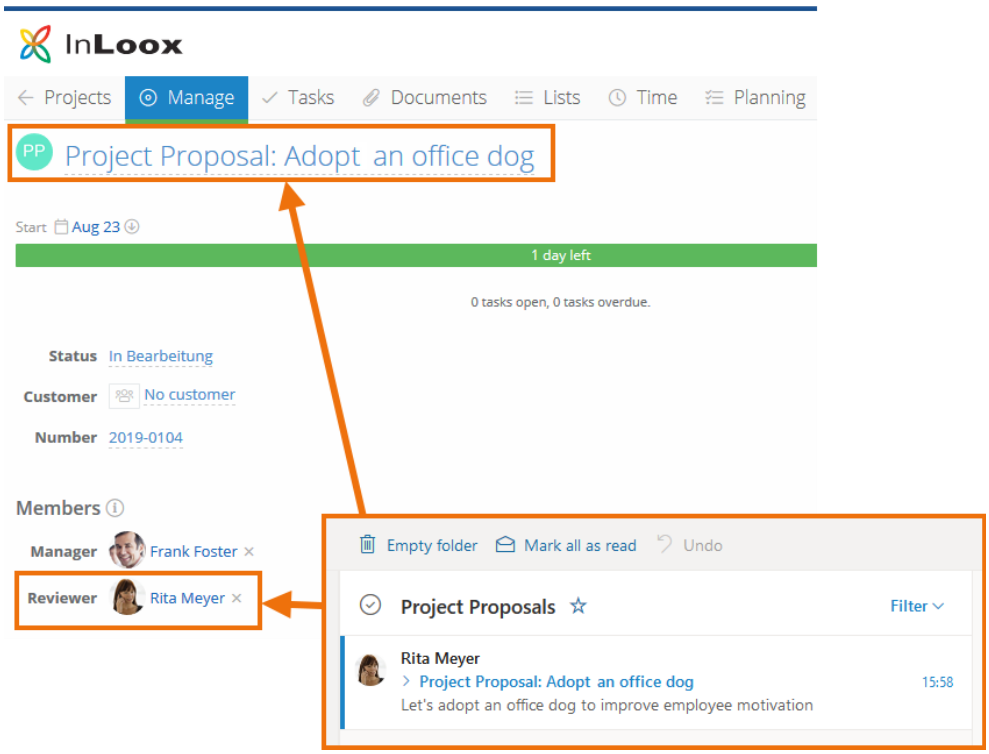

Add the content ***ProjectId*** to the field ***ProjectId***.

There are five project roles in InLoox and each role has a specific ID number. The role **Reviewer** has the ID **64**.



11. Click on **Save**

12. Click on **Test** to check whether your Flow works correctly. Select **I'll perform the trigger action** to execute the trigger manually. Send yourself an email with „Project proposal" in the subject and wait until the message **Your flow ran successfully** appears. The rewiewer will now be able to approve or decline the project proposal in InLoox.



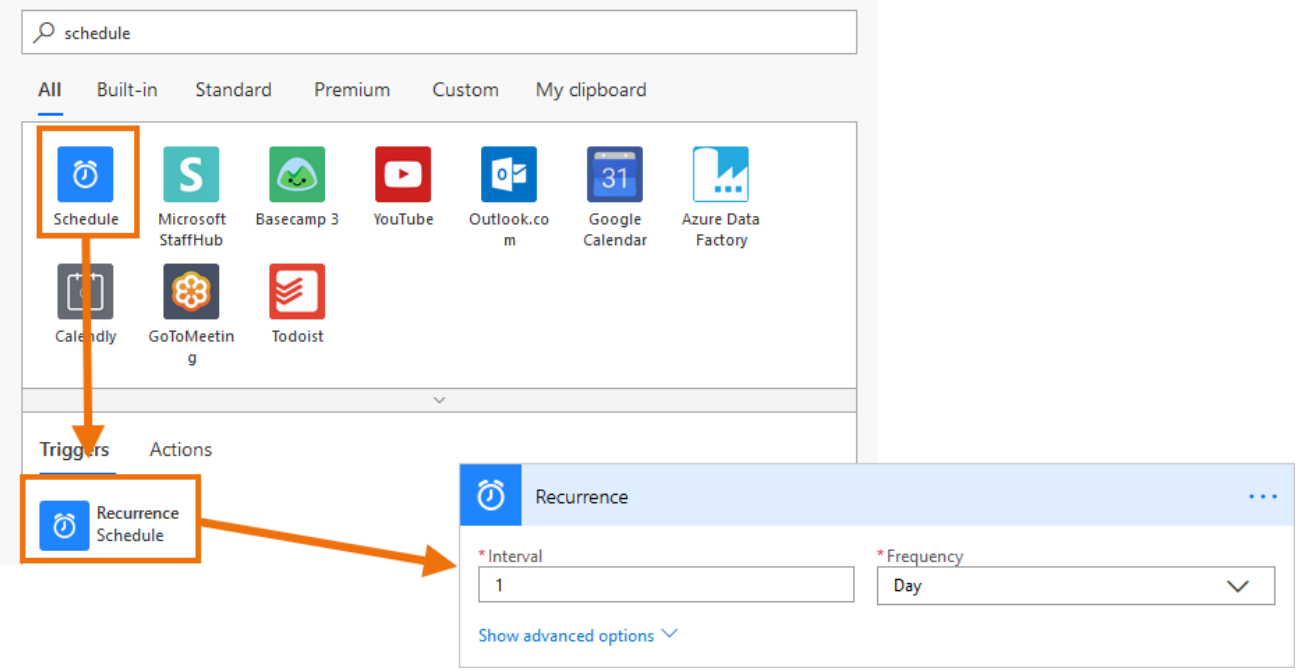
# Scenario 5: Regular summary of all open InLoox tasks via email

As a manager/project manager it is sometimes difficult tokeep track of all projects and tasks. In the fifth and final scenario, we will show you how you can automatically receive an email with all open InLoox tasks (= overdue tasks) across all projects. Here's how it works:

1. Go to **portal.office.com**
2. Open **Power Automate**
3. Click on **My flows** in the sidepanel on the left
4. Click on **New** on the top left side and select **Automated—from blank** from the dropdown menu
5. Click on **Skip** in the next window
6. Select a **Connector** and a **Trigger** :

   **Connector:** Schedule

   **Trigger**: Recurring —> Define in what interval you would like to receive the information, e.g. once a day.

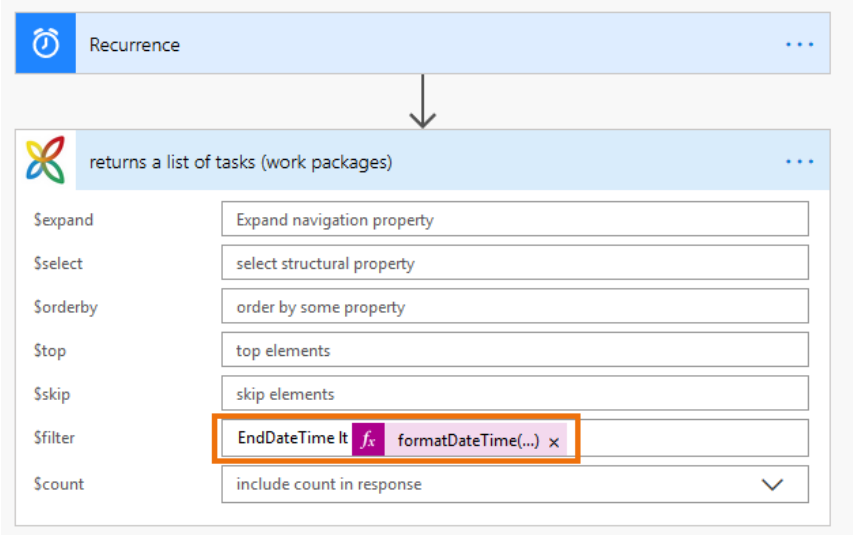


7. Click on + **New Step**
8. Click on **Custom** and select the **InLoox Connector** again. Select another InLoox action: ***returns a list of tasks (work packages)***

   A. Add the following expression into the field **$filter,** this ensures that you will only receive the overdue tasks:

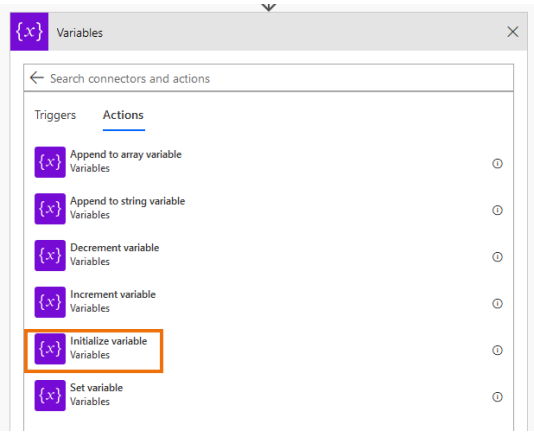
   EndDateTime lt @{formatDateTime(utcNow(), 'yyyy-MM-ddThh:mm:ss.000Z')} and IsDone ne true and IsArchived ne true and IsRecycled ne true and IsRequest ne true

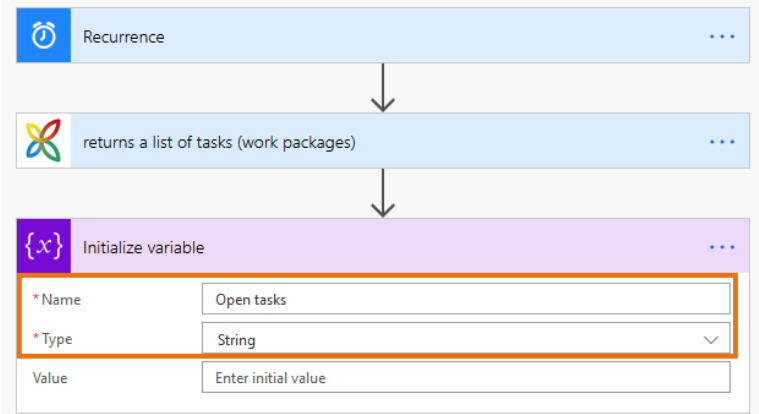
   (Meaning: **EndDateTime lt**: The due dates (end dates) of the tasks are smaller than the current date (lt=less than), so these tasks are overdue. Everything that comes after EndDateTime lt is the expression for the **date formatting**, this ensures that the dates are displayed correctly.)




9. Click on + **New Step**
10. Select a **Connector** and an **Action** :

    **Connector**: Variables



**Action**: Initialize variable >> Enter a name, e.g. „Open tasks“ >> Select **String** as type

11. Click on + **New Step**
12. Select a **Connector** and an **Action** :

**Connector**: Control

**Action**: Apply to each

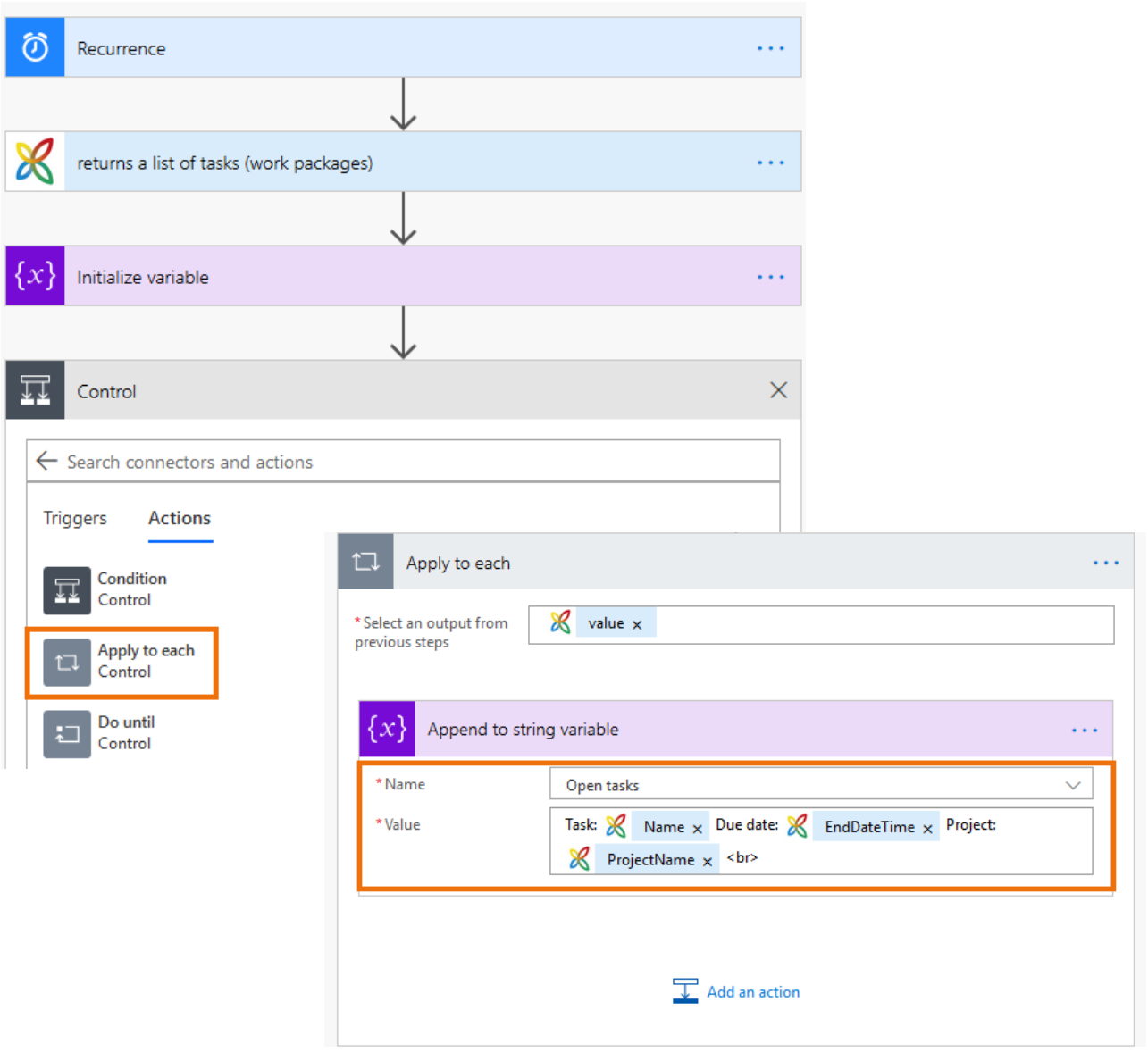
A. **Select an output from previous steps**: Select the InLoox content ***value***

B. Click on **Add an action**

C. Select the action **Append to string variable** (Connector: Variables) >> Add a name, e.g. „Open tasks“ and add the following in the field ***Value***:

Name: '@{items('Auf_alle_anwenden')?['Name']}' Enddatum: ' @{formatDateTime(items('Auf_alle_anwenden')?['EndDateTime'], 'yyyy-MM-dd hh:mm')}' <br>

(<br> ensures that each tasks will be displayed in a different line)



13. Click on+ **New Step**
14. Select a **Connector** and an **Action** :

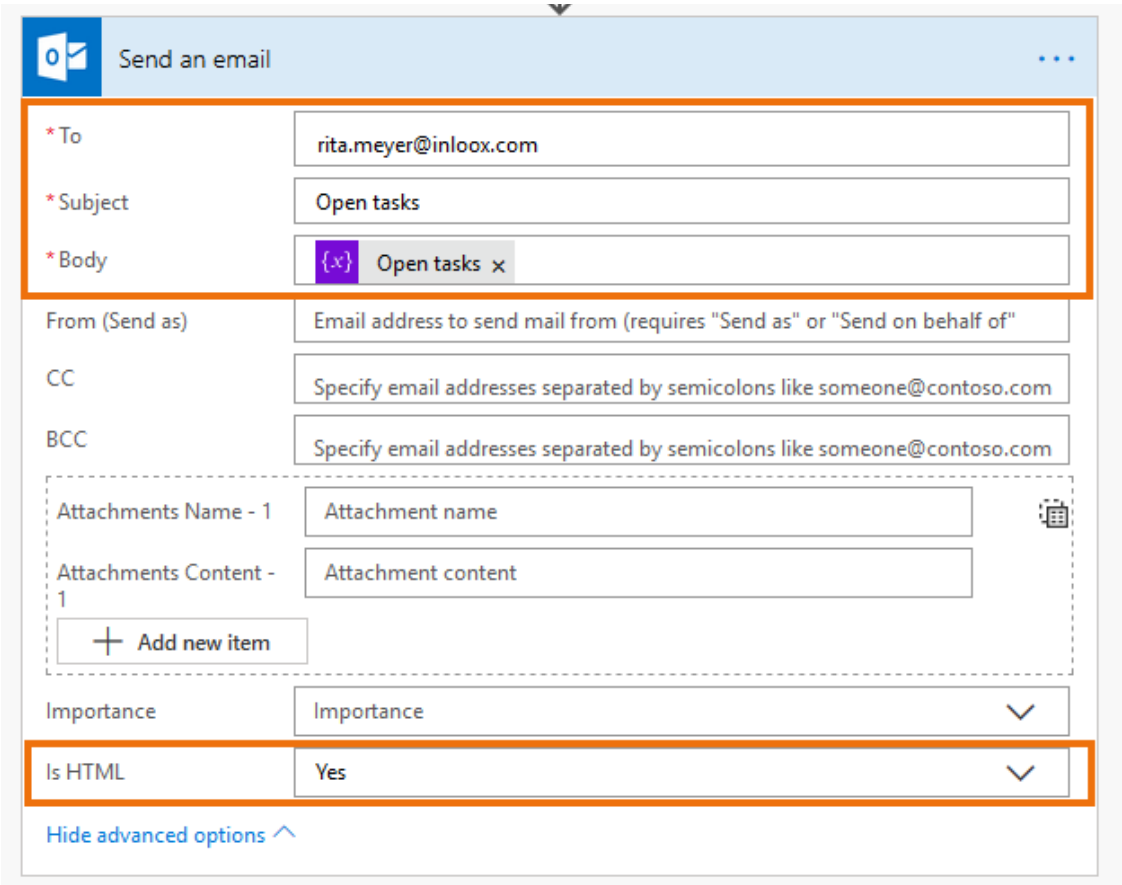
    **Connector**: Office 365 Outlook

    **Action**: Send an email

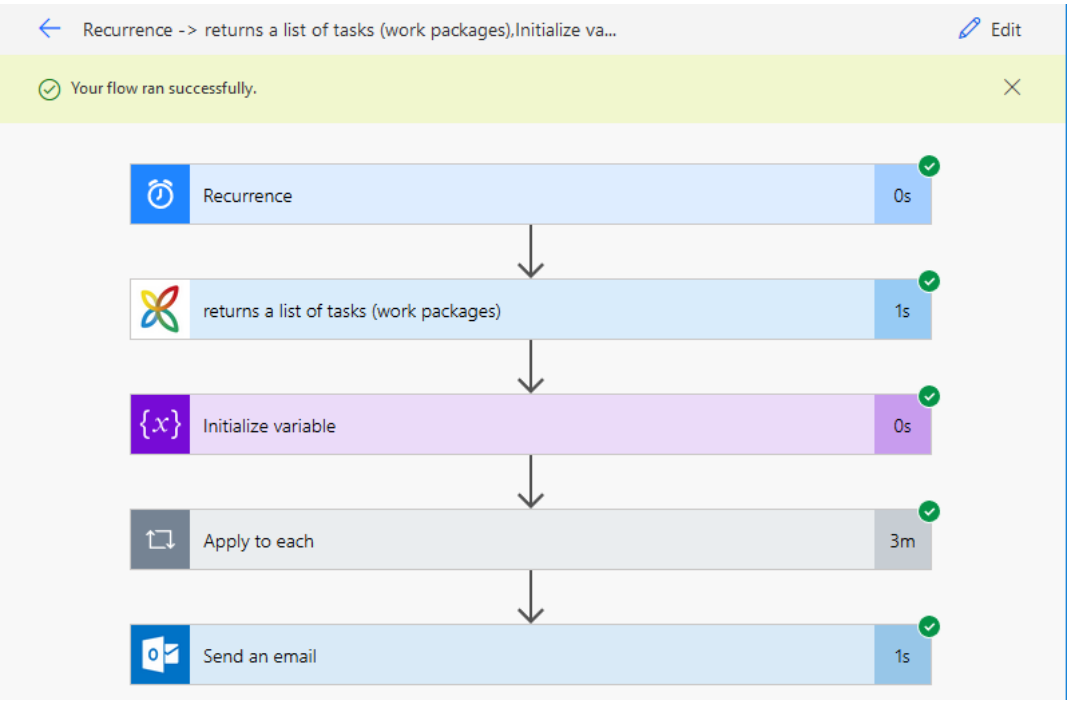
    **To:** Enter an email address

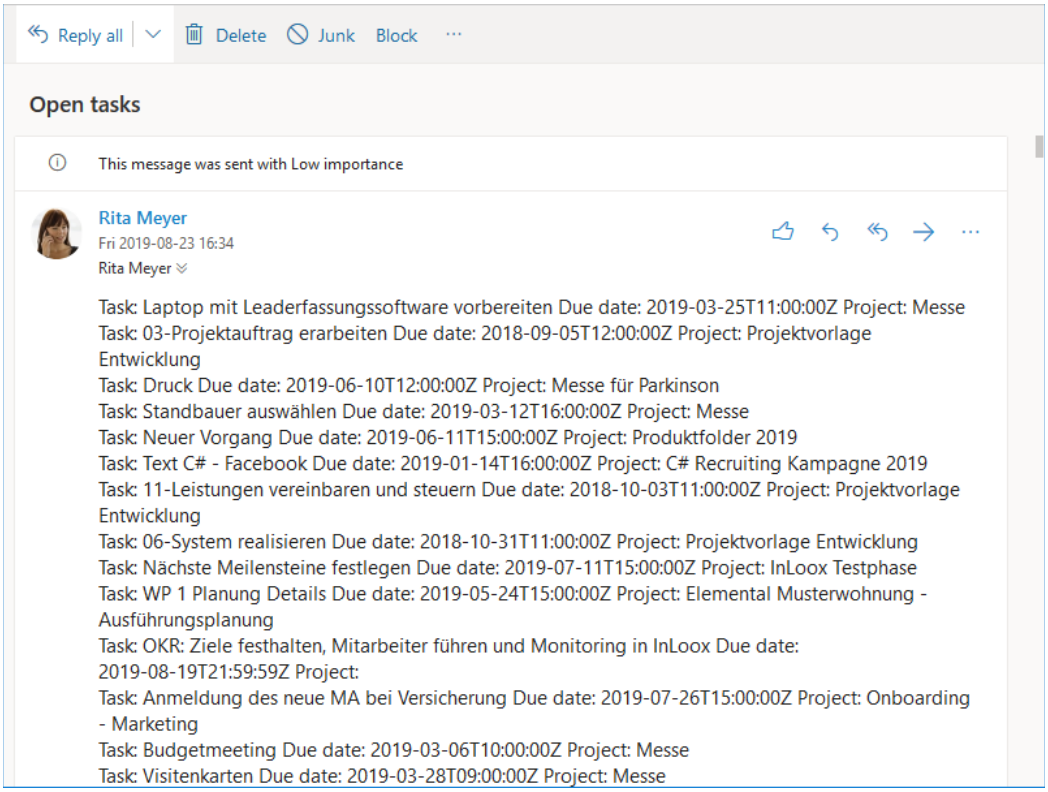
    **Subject**: e.g. „Open tasks“

    **Body**: Select the dynamic content **Open tasks** – open the advanced options and select **Yes** for the field Is **HTML**. This ensures that the task list is displayed correctly.
15. Click on **Save**
16. Click on **Test** to check whether your Flow works correctly. Select **I'll perform the trigger action** to execute the trigger manually. This flow does not require any further action from you to run.




Depending on how many overdue tasks there are in your projects, the test might take a few minutes. When the flow has run successfully, you'll see an email with a list of all open project tasks in your inbox.


Recurrence -> returns a list of tasks (work packages),Initialize va...
Edit
Your flow ran successfully.
Recurrence
0s
returns a list of tasks (work packages)
1s
Initialize variable
0s
Apply to each
3m
Send an email
1s


Reply all
Delete
Junk
Block
Open tasks
This message was sent with Low importance
Rita Meyer
Fri 2019-08-23 16:34
Rita Meyer
Task: Laptop mit Leaderfassungssoftware vorbereiten Due date: 2019-03-25T11:00:00Z Project: Messe
Task: 03-Projektauftrag erarbeiten Due date: 2018-09-05T12:00:00Z Project: Projektvorlage Entwicklung
Task: Druck Due date: 2019-06-10T12:00:00Z Project: Messe für Parkinson
Task: Standbauer auswählen Due date: 2019-03-12T16:00:00Z Project: Messe
Task: Neuer Vorgang Due date: 2019-06-11T15:00:00Z Project: Produktfolder 2019
Task: Text C# - Facebook Due date: 2019-01-14T16:00:00Z Project: C# Recruiting Kampagne 2019
Task: 11-Leistungen vereinbaren und steuern Due date: 2018-10-03T11:00:00Z Project: Projektvorlage Entwicklung
Task: 06-System realisieren Due date: 2018-10-31T11:00:00Z Project: Projektvorlage Entwicklung
Task: Nächste Meilensteine festlegen Due date: 2019-07-11T15:00:00Z Project: InLoox Testphase
Task: WP 1 Planung Details Due date: 2019-05-24T15:00:00Z Project: Elemental Musterwohnung - Ausführungsplanung
Task: OKR: Ziele festhalten, Mitarbeiter führen und Monitoring in InLoox Due date: 2019-08-19T21:59:59Z Project:
Task: Anmeldung des neue MA bei Versicherung Due date: 2019-07-26T15:00:00Z Project: Onboarding - Marketing
Task: Budgetmeeting Due date: 2019-03-06T10:00:00Z Project: Messe
Task: Visitenkarten Due date: 2019-03-28T09:00:00Z Project: Messe

# Import & export flow templates

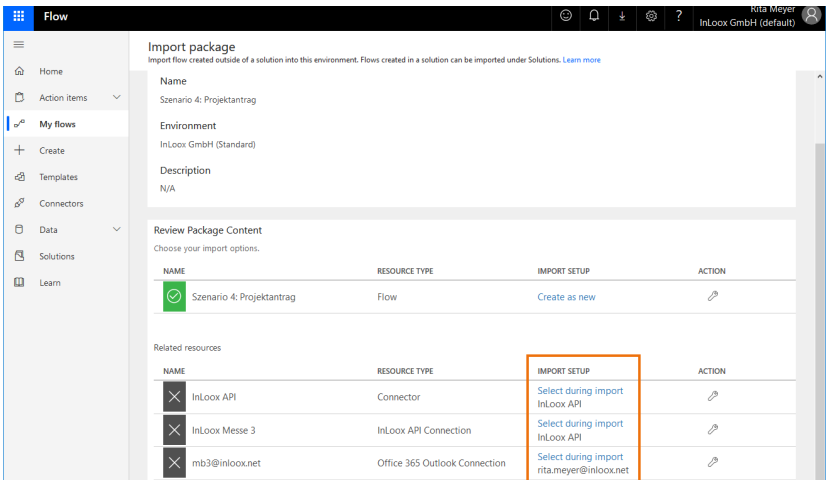
## Import Flow templates

Of course, we also provide you with the flows presented above as a template, so that you simply have to import these templates into your flow.

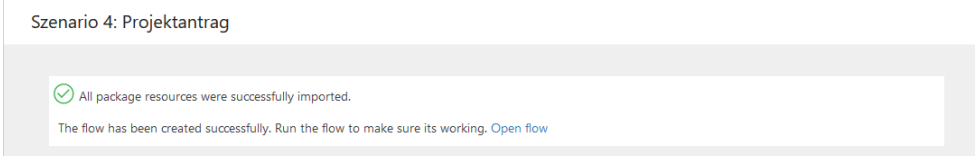
To import a flow template, follow these steps:

First download the InLoox package with the templates, save it and unzip the file. The flow templates can be found in the "Flow Templates" folder as .zip files. (see Chapter 2: Requirements & Preparation)

2. Open Flow: **portal.office.com** >> **Power Automate**
3. Go to **My Flows**
4. Click on **Import**
5. Click **Upload** and select the flow template for the desired scenario
6. You now have to select your **Connector**, your **InLoox API connection** and your **Office 365 Outlook connection** under *Associated Resources*:




7. Click on ***Import.*** You have now successfully imported a flow template.

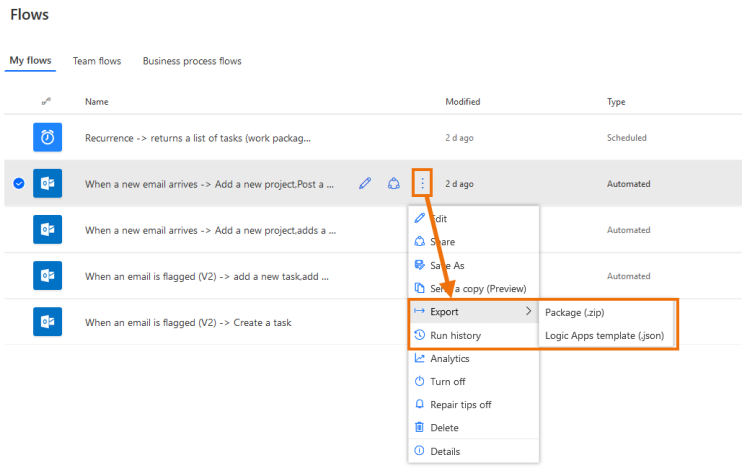


# Flow-Vorlagen exportieren

You can also export flows and share them with your team:

To export a flow template, follow these steps:

1. Open Flow: **portal.office.com** >> **Power Automate**

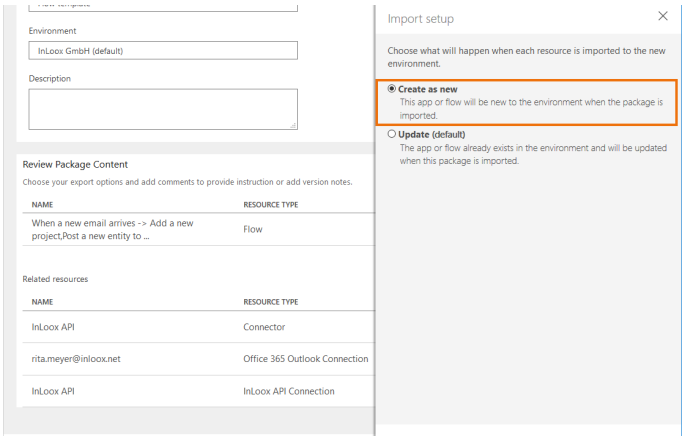



2. Go to **My Flows**

3. Move your mouse over the flow you want to export. Click on the three dots to open the context menu.

Select **Export** from the context menu and click **Package (.zip).**

5. Name your flow template




6. Click on **Update** in the section *Import Setup* and select **Create as new** in the import setup and confirm with **Save**.

7. Click on **Export** and save your template. You can now send your template as a .zip-file and share it with your team.

# 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 offices in San Francisco, USA and Stans, Switzerland.

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InLoox 30-day **free** trial:

www.inloox.com/free-trial

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