Work instruction: “Creating a project with InLoox”

1. Purpose of this work instruction

Describe the purpose of this work instruction in as much detail and as clearly as possible.

For example: The purpose of working with the project management software InLoox is to structure all projects and the related basic project information in a consistent way. This work instruction defines which information must be entered in InLoox for every architecture and construction project, and in which form.

2. Scope

Name the parts of the organization affected by this work instruction (e.g., the entire company, individual branches, individual departments or individual teams).

For example: Creating new projects in the architecture and construction division.

3. Responsibilities

Name the people responsible for applying this work instruction.

For example: Project managers who set up new projects in the architecture and construction division.

4. Terms and abbreviations

If you use specific terms or abbreviations, explain them briefly.

For example: WS = work stage (e.g., RIBA Plan of Work)

5. Description

Define the individual steps of this work instruction as precisely as possible.

For example:

1. Open InLoox at app.inloox.com and sign in.
2. Click **Projects** in the menu on the left to open the project overview.
3. Create a new project by clicking **New project**.
4. Enter the basic information for every new project on the Management page according to the following rules:

©InLoox GmbH

Section of the Management page	**Rule**	**Example**
Project name	1. Type of project 2. Name of project	Office complex City Quarter No. 15
Status	• The status must be updated manually. • It should reflect the current state of the project.	Set the status: • Started: the project has begun • On hold: activities have been suspended, e.g., because of delays in approval processes. • Canceled: the project was canceled (e.g., objectives not achievable, client stops the project, approvals not granted) • Completed: the project was delivered within its objectives and accepted by the client.
Project members (plus sign)		
Project management	Add the project manager first and the deputy second. The deputy only stands in when needed and usually has regular team tasks.	
Team	Add the team members	
Clients	Add the contact person at the client to increase transparency in the project.	
Partners	External companies that work closely with the project	Photo agency, tool supplier or structural engineer
Others	Other project managers or supervisors, if any, who should have insight into the project.	
Dates		
Start	Define when the project starts.	• Order received • Planning created • Start of work on the project

©InLoox GmbH

End	Define when the project is considered complete.	• Final acceptance date • End of planning • SOP • After the lessons learned
Project details		
Description	Record the following project details as keywords: • Project objective(s) • Rough scope of the project (what will be done) • Who is responsible, who takes on which roles etc. Or turn the keywords into text with the AI assistant.	• Objective: construction of the new City Quarter office complex including interior fit-out by week 40 • Scope: we are the general contractor and plan, build and hand over to the client • Responsibilities: Mr. Smith is project manager and coordinator and reports to the client; Ms. Smith is responsible for stakeholder management and project reports.
Project number	Assigned automatically and sequentially by InLoox	
Department	Assign according to the department structure	Architecture & Engineering
Client	Client name preceded by the client number	0035Z BDAG Institute
Category	Select from the predefined project categories	*New build* or *Renovation*
Custom fields	Define custom fields per project type	• SAP no. • Next project meeting • Locations
Comments	For quality assurance, all communication about the project must take place in the project comments. This includes: • Defining which InLoox areas are used (e.g., Documents for filing) • Keeping a project diary • Linking meeting minutes • Recording phone notes	

©InLoox GmbH

If not yet done, define the global role permissions in the InLoox options:

Set the role permissions, for example according to this recommendation:

Permission	Project management	Team	Clients	Partners	Others
Read projects	✓	✓			
Read project rating	✓	✗			
Read project comments	✓	✓			
Read lists	✓	✓			
Read mind maps	✓	✓			
Read tasks	✓	✓			
Read planning	✓	✓			
Read time	✓	✗			
Read own time	✓	✗			
Read documents	✓	✓			
Read finances	✓	✗			
Edit projects	✓	✓			
Edit management	✓	✓			
Edit project contacts	✓	✓			
Edit project rating	✓	✗			
Add project comments	✓	✓			
Delete project comments	✗	✗			
Delete own project comments	✗	✗			
Lock projects	✓	✗			
Edit lists	✓	✓			
Edit mind maps	✓	✓			
Edit tasks	✓	✓			
Edit planning	✓	✗			
Edit time	✓	✗			
Edit own time	✓	✓			
Allow backdating of time entries	✓	✗			
Edit documents	✓	✗			
Edit finances	✓	✗			
Delete projects	✗	✗			
Use existing reports	✓	✓			

6. Version and change history

Keep track of changes to this work instruction by versioning it.

Version no. 1	Date	Responsible
Version no. 2	Date	Responsible
Version no. 3	Date	Responsible

For all InLoox features, you will find step-by-step instructions and video tutorials in the **online help**: docs.inloox.com