Infor Ming.le Mobile Application User Guide - Android OS

Release 12.0.3

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Getting started

Infor Ming.le™ is a mobile application that runs on the Android device. We support these versions of Android:

- 5.0
- 5.0.1
- 5.1.1
- 6.0

The Infor Ming.le mobile application consists of these parts:

- Users
- Groups
- Alerts
- Tasks
- Workflows
- Posts
- Connections
- Notifications

Downloading the Infor Ming.le mobile application

You can download the Infor Ming.le mobile application for Android devices from the Google Play Store.

VPN connection

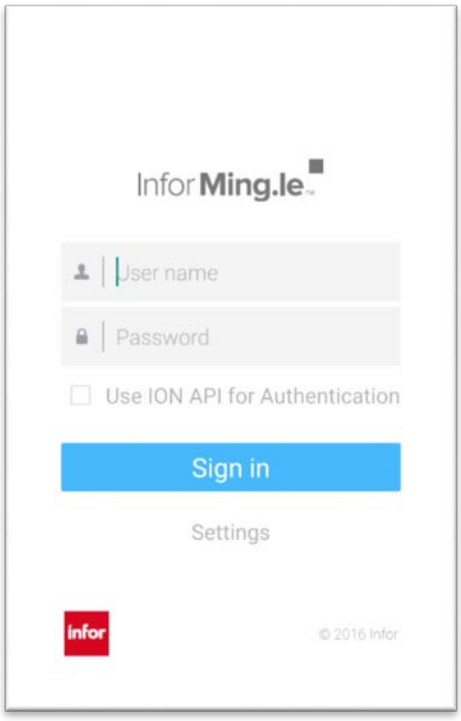
Depending on the configuration of your infrastructure, you may need to use a VPN (virtual private network) to connect to the Infor Ming.le mobile application. Check with your IT department or system administrator for more information.

Installing

Tap **Install** to install the Infor Ming.le mobile application. After the application is installed successfully, tap **Open** to access the mobile application.

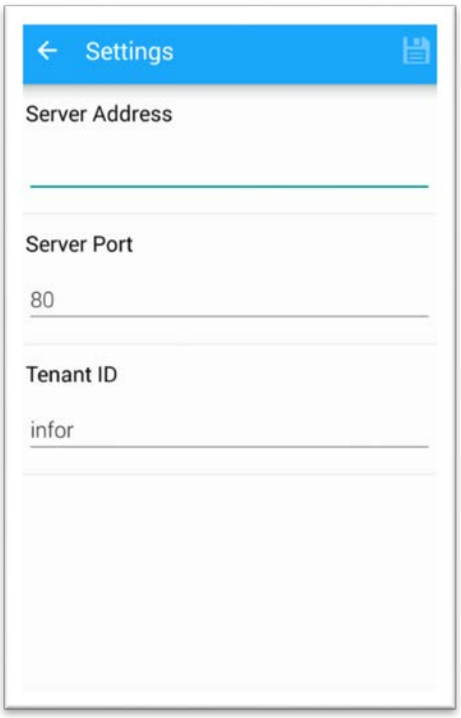
Configuring your application

To configure your application, during the first sign-in, select the authentication method on the Sign in screen based on what version of Infor Ming.le you are using:



Infor Ming.le 11.1.6 or earlier

1 If you have Infor Ming.le 11.1.6 or an earlier version, do not select the **Use ION API for Authentication** box on the Sign in screen. Tap **Settings** to enter your server details on the Settings screen:



2 Each device requires the protocol, host name, and port number of the Infor Ming.le installation. In the Settings section of the Infor Ming.le Mobile application:

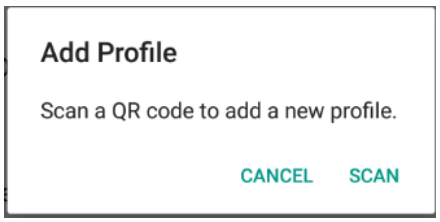
- For the **Server Address**, specify ***<Protocol>://<hostname>***.
- For the **Server Port**, specify ***<portnumber>***.
- For the **Tenant ID**, specify **Infor**.

3 Tap **Save** to save the settings.

4 Tap the back arrow to return to the Sign in screen.

Infor Ming.le 12.0.0 or later

1 If you have Infor Ming.le 12.0.0 or a later version, select the **Use ION API for Authentication** box on the Sign in screen. Tap **Settings** to display this dialog:



2 Tap **Scan**. The camera on your device is activated.

3 Scan a QR code to add the profile to the Profiles screen. You can add a profile by scanning a QR code. On the Add Profile screen, after the successful scan of the QR code, all the values in the fields are filled.

4 Tap **Test Connection** to validate the connection.

5 Tap **Save** to save the profile.

6 Tap the back arrow to go back to the Sign in screen.

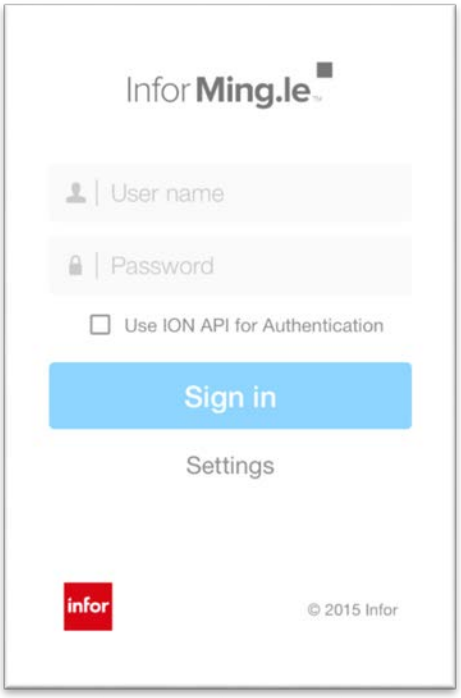
Signing in

When you access Infor Ming.le for the first time, the Sign in screen is displayed.

To access Infor Ming.le after the first time, to sign in to your account, tap the Infor Ming.le application on your device to open it.

Infor Ming.le 11.1.6 or earlier

1 If you have Infor Ming.le 11.1.6 or an earlier version, do not select the **Use ION API for Authentication** box to sign in:



2 Specify your user name and password.

3 Tap **Sign in**.

After successful sign-in, you are on the posts screen.

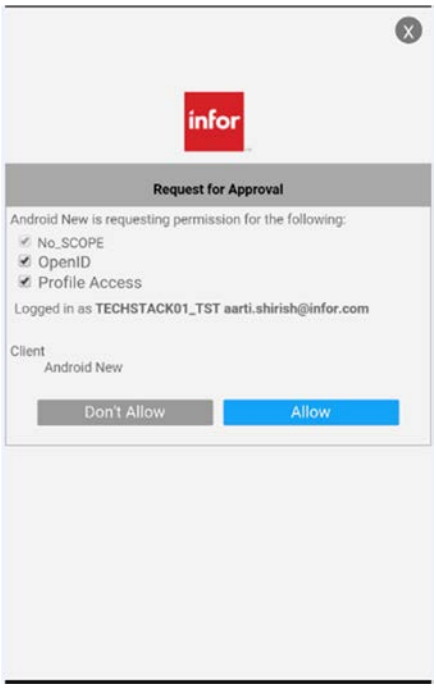
4 If you want to reconfigure your settings, tap **Settings** to open the Settings or Profiles screen, based on your selection. See the “Configuring your application” section above.

Infor Ming.le 12.0.0 or later

1 If you have Infor Ming.le 12.0.0 or a later version, select the **Use ION API for Authentication** box**.** Tap **Sign in** to display the Sign in screen.

2 Based on how it is configured by your administrator, you may be prompted to select one of the Identity Providers. In that case, select the Identity Provider to go to the Sign in screen. Otherwise, you are redirected to the Sign in screen.

3 Enter your credentials to sign in to this environment. The Request for Approval screen is displayed:



4 Tap **Allow** to authorize the mobile application. After successful sign-in, you are on the posts screen.

Hamburger menu

Tap the hamburger menu from the navigation bar to display the left navigation menu.

Navigation

The left Infor Ming.le navigation menu has these options:

User profile

Tap your profile image to access your profile screen. From here, you can:

- Edit your profile
- Review your account information
- Review all of your posts

Alerts

Tap **Alerts** to access the alerts screen. From here, you can review and manage the list of alerts, including:

- Assign and Unassign alerts to yourself
- Assign alerts to others
- Mark an alert as **Done**
- Share alerts
- Add notes and attachments
- View notes and attachments
- Filter by **All Alerts**, **My Alerts**, and **Escalated Alerts**
- Search for any alert

Tasks

Tap **Tasks** to access the tasks screen. From here, you can review and manage the list of tasks, including:

- Assign and Unassign tasks to yourself
- Edit the task parameters

- Drill down the workflow structures
- Take action on a task
- Share tasks
- Add notes and attachments
- View notes and attachments
- Assign tasks to others
- View ION notifications
- Share ION notifications
- Acknowledge ION notifications
- Updates on assigned tasks
- Filter by **All Tasks**, **My Tasks**, and **Escalated Tasks**
- Search for any task
- View a list of workflows
- Start new workflows
- Remove workflows
- Cancel workflows
- View workflow notes
- Search for any workflows

Posts

Tap **Posts** to access the posts screen. From here, you can review and manage the list of posts, including:

- Create new posts
- Tag posts to specific users and groups
- Add a location to the posts
- Like and Unlike posts
- Share posts
- Delete posts
- Add comments
- Tag post comments to specific users
- Add a location to the comments
- Delete comments
- Add attachments
- View attachments

Connections

Tap **Connections** to access the My Connections, My Groups, and Directory screens. From here, you can review and manage the list of users and groups, including:

- Connect/Disconnect to users
- Accept/Decline a user's request
- Cancel the request sent to a user
- Follow/Unfollow users
- Search for users/groups
- Connect/Disconnect to groups
- Accept/Decline the request to join a group
- Cancel the request sent to join a private group

Notifications

Tap **Notifications** to access the notifications screen. From here, you can review the list of notifications, including:

- Comments from other users
- Connection requests
- Group membership requests
- Tagged messages
- Likes from other users
- Delete the notification

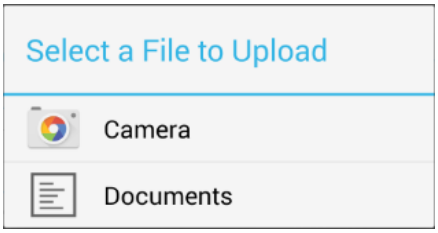
Signing out

Tap **Sign Out** to sign out of the Infor Ming.le mobile application. You are returned to the logon screen, which requires your user name and password credentials.

User profile

Your user profile screen displays your picture, name, and title. The **INFO** tab displays your information, including a **Join Date**, email address, and, if listed, phone numbers. The **POSTS** tab displays all your posts, along with any posts you are tagged in.

Tap your picture to change the profile picture. A dialog displays these options:



Camera

Tap **Camera**. The camera on your device becomes active. You can take a new profile image and tap the check mark icon to upload the new image. Tap the back icon to take another image. Tap the cross mark icon to close the Camera option.

Documents

Tap **Documents**. The images gallery on your device is displayed. You can select an existing image.

Tap the image to select and change the profile image on the user profile screen.

Cancel

Tap the back icon to close the dialog. You remain on the profile screen.

Users

Use the Infor Ming.le mobile application to connect with other users within your company.

You can navigate to another user's profile by tapping the user's name. You can view the user's contact information and posts.

The profile screen displays the selected user's account information and a tab for the user's posts. The profile screen also displays your connection status to the selected user.

Email

You can email any user within the application by tapping an available email address from the selected user's profile screen. The email application opens with the selected email address displayed.

Phone call

You can call any user within the application by tapping an available phone number from the selected user's profile screen. The phone application opens with the selected phone number displayed.

Connection status

The user's profile screen displays your connection status in the upper-right corner.

These are the connection status options:

Connect

To connect to another user, tap **Connect** from that user's profile screen. A new dialog is displayed:

The user receives a notification about your connection request.

The user's profile now displays **Request Sent**.

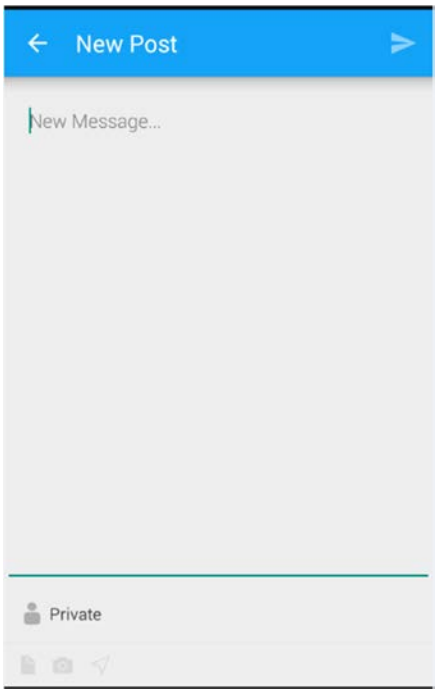
Connected

After the user accepts your connection request, the user's profile displays that you are **Connected**. When you are connected, you can send private messages to the user, and you can view any posts that the connected user sends to other users.

Send Private Message

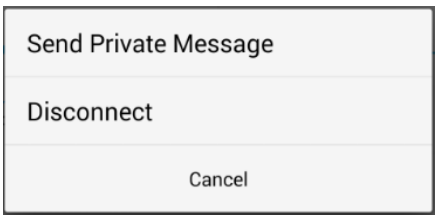
When you are connected to other users, you can send private messages. Tap **Connected** from the user's profile screen to display this dialog:

Tap **Send Private Message** to display the New Post screen. The audience is preset to **Private**. Only the selected individual will receive the message.

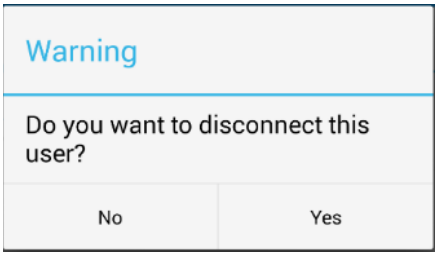


Disconnect

If you are connected to another user, you can also disconnect from that user. Tap **Connected** from the user's profile screen to display this dialog:



Tap **Disconnect** to display this message:



Tap **Yes** to disconnect the user. The message is closed. You remain on the user's profile screen. Your connection status shows **Connect**; you will be able to see only the user's posts to public groups.

Tap **No** to stay connected with the user. The message is closed. You remain on the user's profile screen. Your connection status shows **Connected**; you will be able to see all the posts that the user posted.

Tap **Cancel** to close the dialog. You remain on the user's profile screen.

Follow

You can follow a user if you are not connected to that user. This also applies when a connection request is pending. To follow another user, tap **Follow** from the user's profile screen. A new dialog is displayed:

Follow

Tap **Follow**. The connection status on the user's profile displays **Following**. Whether you are following a user or not, you can see that user's public posts.

Unfollow

When you are following another user, you can choose to stop following that user. Tap **Following** from the user's profile screen. This dialog is displayed:

Tap **Unfollow**. The connection status on the user's profile now displays **Connect**. You can still see that user's public posts.

Cancel

Tap **Cancel** to close the dialog. You remain on the user's profile screen.

Groups

The Infor Ming.le mobile application allows you to send messages to groups. Groups are created on the web client. A group can be public or private. When a group is public, any user can view the group posts. When a group is private, only the members of that group can view the posts.

The group profile screen includes the group name, privacy setting, and tabs for group information, group members, and posts.

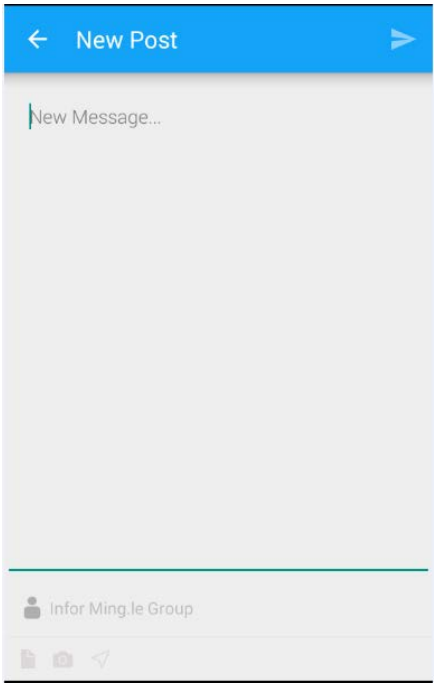
Tap the **MEMBERS** tab and scroll down the screen to see a list of all group members. You can also access the member's profile by tapping the name or image.

If you are a group member, the action icon is displayed.

Send Group Message

To send a message to a group, tap the action icon to display the New Post screen. Only the members of the group receive the message.

If you are not a member of the group, the action icon is not displayed.



Type your message and tap the save icon to send the message to all members of the selected group.

Invite Users to Group

If you are a group administrator, you can invite users to join a group. Tap the add user icon to display the colleagues screen. Tap users from the list to select them and tap **OK**.

The selected users receive a notification inviting them to join the group.

Tap **Cancel** to cancel the selection of users. None of the selected users will receive a notification inviting them to join the group.

Alerts

The alerts screen displays the most recent alerts. You can also filter by tapping the filter icon and selecting an option from the overlay screen. On the alerts screen, an escalated icon is next to those alerts that have an escalated priority.

Tap the alert to display the details screen, which also includes a summary and the attributes of the alert.

Assignment

Tap the assign icon to change the assignment. A dialog is displayed in the middle of the screen:

Assign to Me

Tap **Assign to Me**. The alert is now assigned to you and is removed from the alert list of other users. The assign icon is shaded, and you can mark the alert as **Done**. You can upload notes and attachments.

Assign to Other

Tap **Assign to Other**. The users list is displayed, and you can assign the task to another user. When assigned to another user, the task is removed from your list.

Unassign (only if Assigned to Me)

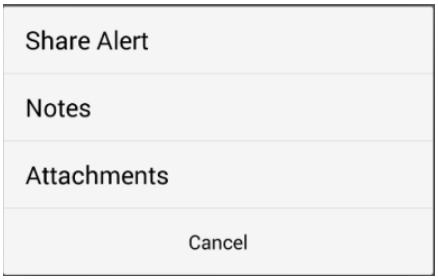
Tap **Unassign**. The alert is removed from your alert list, and other users can assign themselves to it. The assign icon is no longer shaded.

Cancel

Tap **Cancel**. The assignment dialog is closed, and you remain on the alert details screen.

Actions, if Assigned to Me

Tap the action icon to display these options:



Share Alert

Tap **Share Alert** to display the alert on a new screen.

You can:

- Add more content or edit the alert
- Share it with specific users or groups
- Add attachments
- Add a location
- Send

Cancel Share Alert

Tap the back icon to return to the alert details screen.

Add Note/Notes

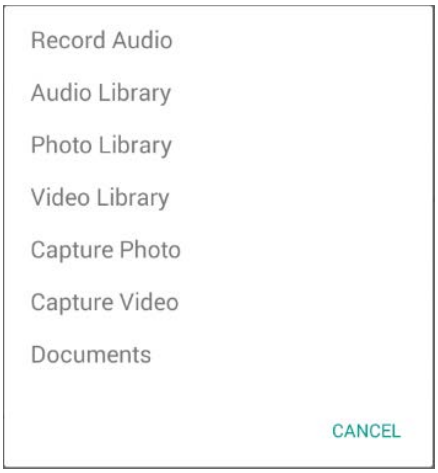
If notes do not exist, **Add Note** is displayed. If notes exist, **Notes** is displayed.

Tap **Add Note** or **Notes** to access the notes screen. After you type in the New Note section of the screen, **Send** is displayed. Tap **Send** to display your note on the left side of the screen along with your profile image. Notes by others are displayed on the right side of the screen.

Add Attachment/View Attachments

If attachments do not exist, **Add Attachment** is displayed. If at least one attachment exists, **View Attachments** is displayed.

Tap **Add Attachment** to display this dialog:



Record Audio

Tap **Record Audio**. The Record Audio screen is displayed with the record icon in the center of the screen. Tap **Tap to record** to record the voice or conversation. Tap the record icon to stop recording, and tap the save icon to attach this audio file to your alert. The audio file is displayed as an attachment on the attachments screen.

Audio Library

Tap **Audio Library**. All the available audio files, if any, on your device are displayed. Tap the file to select a file, and tap **Done** to attach this audio file to your alert.

If audio files are not available, a **No Audio Files** message is displayed.

Photo Library

Tap **Photo Library**. The **Open from** slide screen on your device is displayed, and the Images folder is highlighted. Tap **Images**. The image library on your device is displayed. You can select one or more existing images. The selected images are uploaded and displayed as attachments to your alert.

Video Library

Tap **Video Library**. The **Open from** slide screen on your device is displayed, and Videos folder is highlighted. Tap **Videos**. The video library on your device is displayed. You can select one or more existing videos. The selected videos are uploaded and displayed as attachments to your alert.

Capture Photo

Tap **Capture Photo**. The camera on your device is activated. You can take a new photo and tap the check mark icon to upload the new photo. Tap the back icon to take another photo**.** Tap the cross mark icon to close the camera.

Capture Video

Tap **Capture Video**. The camcorder on your device is activated. You can record the video and tap the check mark icon to upload the new video. Tap the back icon to record the new video. Tap the cross mark icon to close the camcorder.

Documents

Tap **Documents.** The **Open from** slide screen on your device is displayed. You can select existing images, videos, audios, and any other files from Downloads folder. Tap one or more images, videos, audios, and other files to select them, and tap **Done** to add these files to an alert item. They are displayed on the attachments screen.

Cancel

Tap **Cancel** to close the dialog. You remain on the attachments screen.

View Attachments

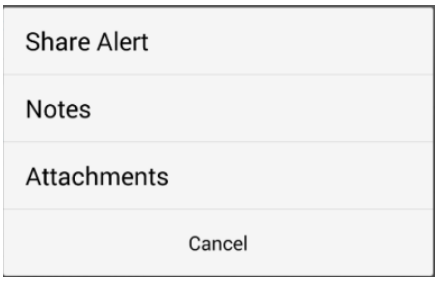
Tap **View Attachments** to access the attachments screen where all existing alert attachments are displayed.

When you click a file attachment, the attachment is opened in the external application for that type of attachment. You may be prompted to download an external application to view the attachment if your device cannot open the supported file types.

If an alert is assigned to you, the plus icon is displayed on the Attachments screen so that you can add additional attachments to the alert.

Actions, if Not Assigned to Me

Tap the action icon to display these options:



Share Alert

Tap **Share Alert** to display the alert in a new window. You can:

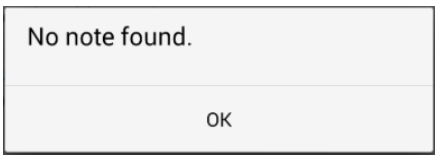
- Add more content to the alert
- Share it with specific users or groups
- Add attachments
- Add a location
- Send

Cancel Share Alert

Tap the back icon to return to the alert details screen.

Notes

Tap **Notes**. The notes screen is displayed. If no notes exist, this message is displayed:



Tap **OK** to close the message dialog. Tap the back icon to return to the alert details screen.

View Notes

Tap **Notes** to access the notes screen where all existing notes are displayed. If the alert is not assigned to you, you cannot create a new note. Tap the back icon to return to the alert details screen.

Attachments

Tap **Attachments**. The attachments screen is displayed. If no attachments exist, this message is displayed:

Tap **OK** to close the message dialog. Tap the back icon to return to alert details screen.

View Attachments

If attachments exist, tap **Attachments** to access the attachments screen where all existing attachments are displayed.

If the attachment is a file, when you click it, the file is opened in the external application for that type of attachment. You may be prompted to download an external application to view the attachment if your device cannot open the supported file types.

If an alert is not assigned to you, you cannot add a new attachment. Tap the back icon to return to the alert details screen.

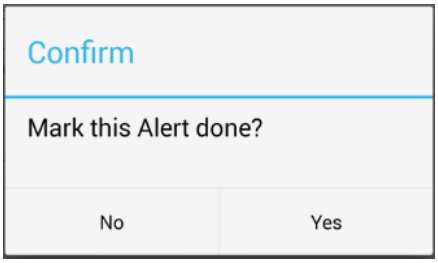
Cancel

Tap **Cancel** to close the dialog. You remain on the alert details screen.

Mark as Done

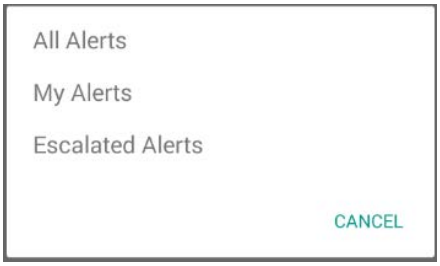
If a task is assigned to you, you can mark it as **Done** on the alert details screen.

When you tap **Done**, this message is displayed:



Tap **No** to close the message dialog and return to the alert details screen. Tap **Yes** to close the message dialog and remove the alert from your list.

Filter



Tap the filter icon from the alerts top navigation to display the filter options:

- **All Alerts**
- **My Alerts**
- **Escalated Alerts**

Tap any of the options to filter the alerts accordingly.

The top navigation also displays the filtered selection.

Tap **Cancel** to close the dialog. You remain on the alerts screen.

Search Alerts

You can search for any particular alerts on the alerts screen:

As you start entering text, matching results are displayed.

Tap **X** to clear the search input area.

Tasks

The Tasks section has Tasks and Workflows features.

The tasks screen displays the most recent tasks and ION notifications. On the tasks screen, an escalated icon is next to those tasks that have an escalated priority. You can also filter tasks by selecting a category from the filter overlay.

Tap the task or ION notification to display the task details screen, which also includes a summary and the task parameters.

Assignment

Tap the assign icon to change the assignment. A dialog is displayed in the middle of the screen:

Assign to Me

Tap **Assign to Me**. The task is now assigned to you. It is removed from the task list of other users. The assign icon is shaded. You can take action on the task and can also upload notes and attachments.

Edit Parameters

After the task is assigned to yourself and if the task parameters are editable, tap and hold the parameter row to display the cursor. Tap **Backspace** to remove the current value and enter the new value. Tap **Done** to save the new value.

Drilldown the Structures

Based on the definition of the workflow and if structures are part of the workflow, the task is displayed with structures on the tasks details screen. Tap the right arrow to drill down the values. To drill further down, tap other right arrows, if any, to view the complete tree structure.

Unassign, only if Assigned to Me

Tap **Unassign**. The task is now removed from your task list, and other users can select it. The assign icon is no longer shaded.

Assign to Other

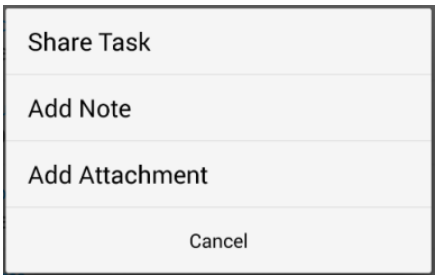
Tap **Assign to Other**. A users list is displayed, and you can assign the task to another user. After the task is assigned to another user, it is removed from the list.

Cancel

Tap **Cancel**. The assignment dialog is closed. You remain on the task details screen.

Actions, if Assigned to Me

Tap the action icon to display these options:



Share Task

Tap **Share Task** to display the task in a new window. You can:

- Add more content or edit the task
- Share it with specific users or groups
- Add attachments
- Add a location
- Send

Cancel Share Task

Tap the back icon to return to the task details screen.

Add Note/View Notes

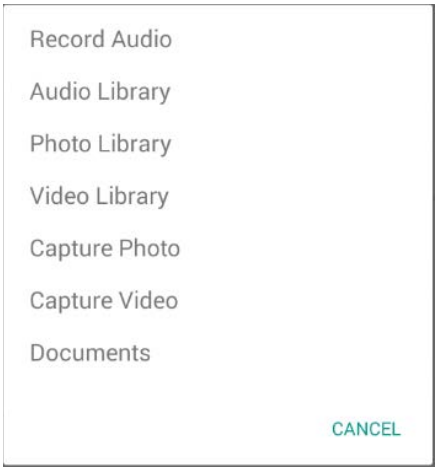
If notes do not exist, **Add Note** is displayed. If notes exist, **View Notes** is displayed.

Tap **Add Note** or **View Notes** to access the notes screen. After you type in the New Note section of the screen, **Send** is displayed on the right. Tap **Send** to display your note on the left side of the screen, along with your profile image. Notes by other users are displayed on the right side of the screen.

Add Attachment/View Attachments

If attachments do not exist, **Add Attachment** is displayed. If at least one attachment exists, **View Attachments** is displayed.

Tap **Add Attachment** to display this dialog:



Record Audio

Tap **Record Audio**. The Record Audio screen is displayed with the record icon in the center of the screen. Tap **Tap to record** to record the voice or conversation. Tap the record icon to stop recording, and tap the save icon to attach this audio file to your task. The audio file is displayed as an attachment on the attachments screen.

Audio Library

Tap **Audio Library**. All the available audio files, if any, on your device are displayed. Tap the file to select a file, and tap **Done** to attach this audio file to your task.

If audio files are not available, a **No Audio Files** message is displayed.

Photo Library

Tap **Photo Library**. The **Open from** slide screen on your device is displayed, and the Images folder is highlighted. Tap **Images**. The image library on your device is displayed. You can select one or more existing images. The selected images are uploaded and displayed as attachments to your task.

Video Library

Tap **Video Library**. The **Open from** slide screen on your device is displayed, and Videos folder is highlighted. Tap **Videos**. The video library on your device is displayed. You can select one or more existing videos. The selected videos are uploaded and displayed as attachments to your task.

Capture Photo

Tap **Capture Photo**. The camera on your device is activated. You can take a new photo and tap the check mark icon to upload the new photo. Tap the back icon to take another photo**.** Tap the cross mark icon to close the camera.

Capture Video

Tap **Capture Video**. The camcorder on your device is activated. You can record the video and tap the check mark icon to upload the new video. Tap the back icon to record the new video. Tap the cross mark icon to close the camcorder.

Documents

Tap **Documents.** The **Open from** slide screen on your device is displayed. You can select existing images, videos, audios, and any other files from Downloads folder. Tap one or more images, videos, audios, and other files to select them, and tap **Done** to add these files to a task item. They are displayed on the attachments screen.

Cancel

Tap **Cancel** to close the dialog. You remain on the task details screen.

View Attachments

Tap **View Attachments** to access the attachments screen where all existing task attachments are displayed.

When you click a file attachment, the attachment is opened in the external application for that type of attachment. You may be prompted to download an external application to view the attachment if your device cannot open the supported file types.

If a task is assigned to you, the plus icon is displayed on the Attachments screen so that you can add additional attachments to the task.

Actions, ION Notification

Tap the action icon to display the **Share** option.

Share ION Notification

Tap **Share** to display the notification in a new window. You can:

- Add more content or edit the ION notification
- Share it with specific users or groups
- Add attachments
- Add a location
- Post

Cancel Share ION Notification

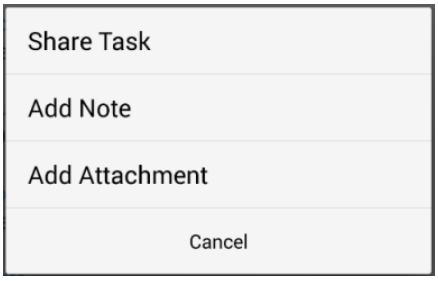
Tap the back icon to return to the task details screen.

Acknowledge ION Notification

Tap **Done** to acknowledge an ION notification. All acknowledged ION notifications are removed from the tasks list.

Actions, if not Assigned to Me

Tap the action icon to display these options:



Share Task

Tap **Share Task** to display the task in a new window. You can:

- Add more content to the task
- Share it with specific users or groups
- Add attachments

- Add a location
- Send

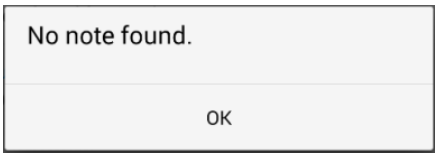
Cancel Share Task

Tap the back icon to return to the task details screen.

Add Note

If notes do not exist, **Add Note** is displayed. If notes exist, **View Notes** is displayed.

Tap **Add Note**. The notes screen is displayed. If no notes exist, this message is displayed:



Tap **OK** to close the message dialog. Tap the back icon to return to the task details screen.

View Notes

Tap **View Notes** to access the notes screen where all existing notes are displayed. If the task is not assigned to you, you cannot create a new note. Tap the back icon to return to the task details screen.

Add Attachment

If attachments do not exist, **Add Attachment** is displayed. If an attachment exists, **View Attachments** is displayed.

Tap **Add Attachment**. The attachments screen is displayed. If attachments do not exist, this message is displayed:

Tap **OK** to close the message dialog. Tap the back icon to return to the task details screen.

View Attachments

If attachments exist, tap **View Attachments** to access the attachments screen where all existing attachments are displayed.

If the attachment is a file, when you click it, the file is opened in the external application for that type of attachment. You may be prompted to download an external application to view the attachment if your device cannot open the supported file types.

If the task is not assigned to you, you cannot add a new attachment. Tap the back icon to return to the task details screen.

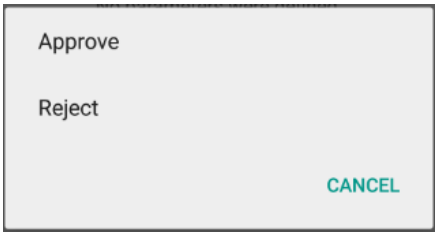
Cancel

Tap **Cancel** to close the dialog. You remain on the task details screen.

Take Action

If a task is assigned to you, you can take action on the task details screen.

When you tap the action icon, these options are displayed:



Approve

Tap **Approve**. The task is removed from your tasks list.

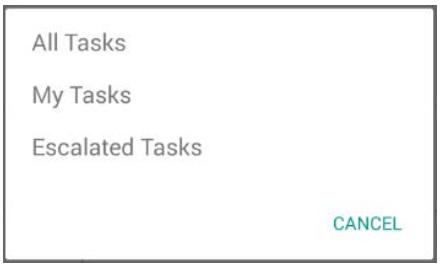
Reject

Tap **Reject**. The task is removed from your tasks list.

Cancel

Tap **CANCEL** to close the dialog. You remain on the task details screen.

Filter



Tap the filter icon from the tasks top navigation to display the filter options:

- **All Tasks**
- **My Tasks**
- **Escalated Tasks**

Tap any of the options to filter the tasks accordingly.

The top navigation also displays the filtered selection.

Tap **Cancel** to close the dialog. You remain on the tasks screen.

Search Tasks

You can search for any tasks on the tasks screen:

As you start entering text, matching results are displayed.

Tap **X** to clear the search input area.

Workflows

Workflows are part of the Tasks section. Tap the drop-down arrow to display this dialog:

Tap **Workflows** to go to Workflows screen. The workflows screen displays all of the workflow instances, if any. If there are no workflows to display, a message is displayed to indicate that no workflows exist.

Tap the filter icon to display all of the workflow categories:

- All
- Running
- Completed
- Canceled
- Failed

Tap a category to display the workflows for that category.

Workflow Details

Tap the workflow to display the details screen. On the details screen, you can view the workflow name and description, status, along with the attachments, if any, and the parameters of the workflow.

View Attachments

Tap the file type icon to view the content of a file.

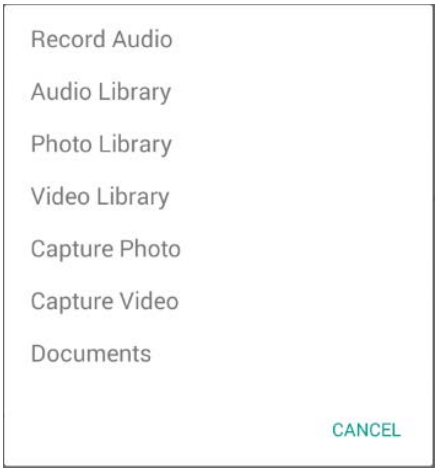
When you click a file attachment, the attachment is opened in the external application for that type of attachment. You may be prompted to download an external application to view the attachment if your device cannot open the supported file types.

Starting a workflow

You can start a workflow manually from your mobile application. Tap the plus icon ⊕ to display the New Workflow screen. On the New Workflow screen, all the available workflow templates are listed. Tap the workflow template that you want to use. Based on the definition of the workflow selected, the corresponding input fields are displayed. You can customize the workflow instance name and description and enter the values in the mandatory fields.

Add Attachments

You can add attachments to new and running workflow instances. Tap **Add New** on the New Workflow screen to prompt this dialog:



Record Audio

Tap **Record Audio**. The Record Audio screen is displayed with the record icon in the center of the screen. Tap **Tap to record** to record the voice or conversation. Tap the record icon to stop recording and tap **Save** to attach this audio file to your workflow. The audio file is displayed as an attachment on the attachments screen.

Audio Library

Tap **Audio Library**. All the available audio files on your device are displayed, if any. Tap the file to select a file and tap **Done** to attach this audio file to your workflow.

If audio files are not available, a **No Audio Files** message is displayed.

Photo Library

Tap **Photo Library**. The **Open from** slide screen on your device is displayed, and the Images folder is highlighted. Tap **Images**. The image library on your device is displayed. You can select one or more existing images. The selected images are uploaded and displayed as attachments to your workflow.

Video Library

Tap **Video Library**. The **Open from** slide screen on your device is displayed, and Videos folder is highlighted. Tap **Videos**. The video library on your device is displayed. You can select one or more existing videos. The selected videos are uploaded and displayed as attachments to your workflow.

Capture Photo

Tap **Capture Photo**. The camera on your device is activated. You can take a new photo and tap the check mark icon to upload the new photo. Tap the back icon to take another photo**.** Tap the cross mark icon to close the camera.

Capture Video

Tap **Capture Video**. The camcorder on your device is activated. You can record the video and tap the check mark icon to upload the new video. Tap the back icon to record the new video. Tap the cross mark icon to close the camcorder.

Documents

Tap **Documents.** The **Open from** slide screen on your device is displayed. You can select an existing image, video, audio or any other file from the Downloads folder. Tap the image, video, audio, or file to add it to your workflow. It is displayed on the attachments screen.

Tap **Documents.** The **Open from** slide screen on your device is displayed. You can select existing images, videos, audios, and any other files from Downloads folder. Tap one or more images, videos, audios, and other files to select them, and tap **Done** to add these files to your workflow. They are displayed on the attachments screen.

Cancel

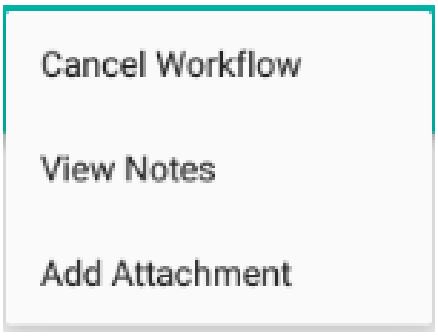
Tap **Cancel**. The dialog box closes, and you remain on the New Workflow screen.

After you finish adding the attachments to a new workflow instance, tap **Start** to start the new workflow instance.

Cancel a Workflow

If a workflow instance is in running status, you can either cancel the workflow or add attachments to it.

Tap the more icon ••• on the Workflow Details screen to display this dialog:



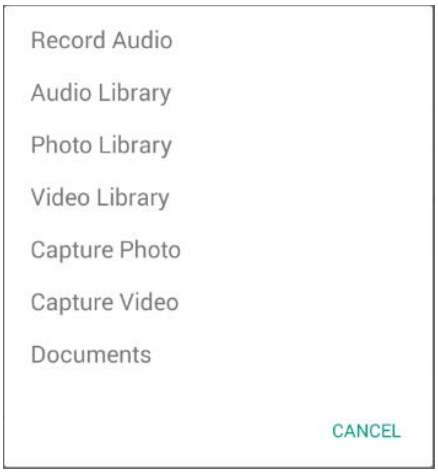
Tap **Cancel Workflow**. The workflow is now canceled and the status of the workflow changes to Canceled.

View Notes

You can view notes related to all of the workflow instances that you started, if any. Tap **View Notes** to go to the notes screen. All notes, within the specified date range, are listed on the screen.

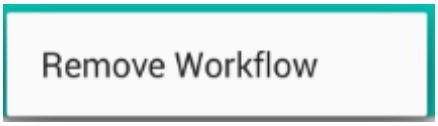
Add Attachments

You can add attachments to running workflow instances. Tap **Add Attachments** to display this dialog:



Remove a Workflow

You can remove a workflow instance if the workflow is in completed, canceled, or in failed status. Tap the more icon ••• to display this dialog:



Tap **Remove Workflow**. The workflow is now removed from the workflows list view.

Search Workflows

You can search for any particular workflows on the workflow screen:

As you start entering text, matching results are displayed.

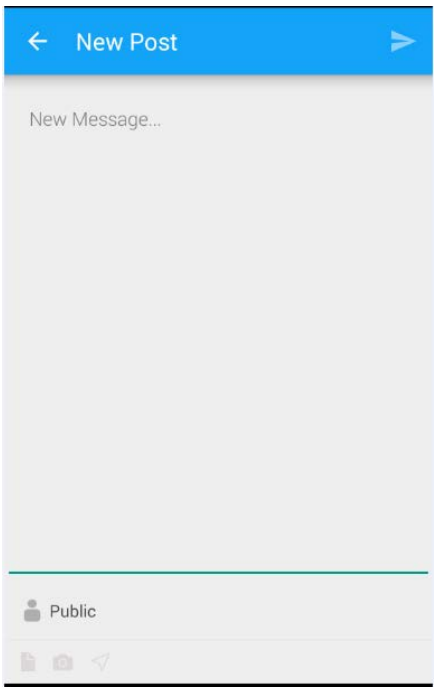
Tap **X** to clear the search input area.

Posts

The post screen displays the most recent posts. Each post has options that are displayed when you open the post, such as adding a comment and sharing the post.

Create Post

To create a post, tap the plus icon. This screen is displayed:



Enter your message in the **New Post** area. When you start entering text, the file , camera and location icons are activated.

When creating a new post, you can specify users and groups within your post by using the “@” sign. When you input the “@” sign, a new window is displayed. Input a letter in the new window. A list of matching users and groups are displayed.

Tap the user or group to select it. The name is highlighted in the post area. Tap the send icon to post the message. The user or group receives a notification about being mentioned in the post.

Visibility (privacy level)

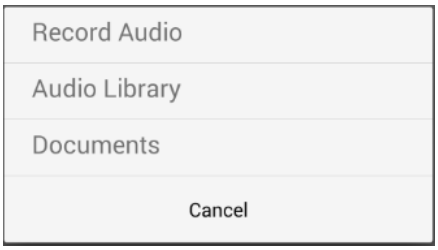
Tap **Public** in area below the New Post section to change the privacy level of the post . Tap **Public** to display different options for the visibility of the post. Tap the option to determine the audience for the post. Only the chosen users or group can see the post.

Add Attachments

You can add attachments to your post by tapping the file and camera icons. Each icon gives you different options to attach different type of files.

File

Tap the file icon to add audio attachments, displayed on the left side of the assignment. Tap the file icon to prompt this dialog:



Record Audio

Tap **Record Audio**. The Record Audio screen is displayed with the record icon in the center of the screen. Tap **Tap to record** to record the voice or conversation. Tap the record icon to stop recording, and tap the save icon to attach this audio file to your post. The audio file is displayed as an attachment on the New Post screen.

Audio Library

Tap **Audio Library**. All the available audio files, if any, on your device are displayed. Tap the file to select a file, and tap **Done** to attach this audio file to your post.

If audio files are not available, a **No Audio Files** message is displayed.

Documents

Tap **Documents.** The **Open from** slide screen on your device is displayed. You can select an existing image, video, audio, or any other file from Downloads folder. Tap the image, video, audio, or file to add it to the post item. It is displayed on the attachments screen.

Tap **Documents.** The **Open from** slide screen on your device is displayed. You can select existing images, videos, audios, and any other files from Downloads folder. Tap one or more images, videos, audios, and other files to select them, and tap **Done** to add these files to a post item. They are displayed on the attachments screen.

Camera

Tap the camera icon to add photo or video attachments, displayed on the left side of the assignment. Tap the camera icon to prompt this dialog:

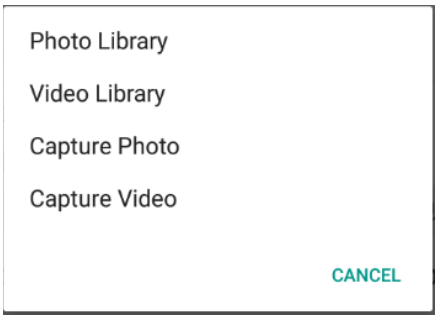


Photo Library

Tap **Photo Library**. The **Open from** slide screen on your device is displayed, and the Images folder is highlighted. Tap **Images**. The image library on your device is displayed. You can select one or more existing images. The selected images are uploaded and displayed as attachments to your post.

Video Library

Tap **Video Library**. The **Open from** slide screen on your device is displayed, and Videos folder is highlighted. Tap **Videos**. The video library on your device is displayed. You can select one or more existing videos. The selected videos are uploaded and displayed as attachments to your post.

Capture Photo

Tap **Capture Photo**. The camera on your device is activated. You can take a new photo and tap the check mark icon to upload the new photo. Tap the back icon to take another photo. Tap the cross mark icon to close the camera.

Capture Video

Tap **Capture Video**. The camcorder on your device is activated. You can record the video and tap the check mark icon to upload the new video. Tap the back icon to record the new video. Tap the cross mark icon to close the camcorder.

Cancel

Tap **Cancel** to close the dialog. You remain on the new posts screen.

Add Location

Tap the location icon to add your current location to the post. The location value is displayed next to the location icon.

Post

Tap the send icon to post your new message to the users and groups specified within your post. Your post is also displayed on the Posts section of your profile screen.

Cancel

Tap the back icon to cancel the new post. The New Post screen closes and you are returned to the posts screen.

Post Details

From the post details screen, you can view the original post, along with any additional comments and attachments.

From the post details screen, you can view the original post with location details, if any, along with any additional comments, the number of likes, and the number of attachments.

View Attachments

You can view the attachments of the post, if any. Tap the camera icon to view the image attachments. Tap the file icon to view the file attachments.

When you click a file attachment, the attachment is opened in the external application for that type of attachment. You may be prompted to download an external application to view the attachment if your device cannot open the supported file types.

Like/Unlike Post

Tap the heart icon , to Like a post. If another user likes your post, you receive a notification. If you tap the heart icon for a post, the like count is increased by a number and the total number of likes is displayed next to the heart icon.

Tap the same heart icon to Unlike a post. If you tap the heart icon for a post, the like count is decreased by a number, and the updated total number of likes is displayed next to the heart icon.

Add Comment

On the post details screen, you can add a new comment to the post. Tap the New Comment section. A cursor is displayed. When you start entering the text,the file, camera, and location icons and the **Post** option become active. You can also tag specific users to your comment.

Add Attachments

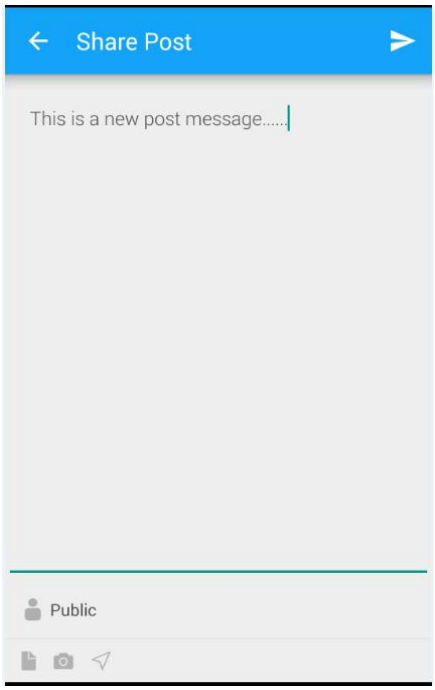
You can add the attachments to your comment. Tap the file and camera icons to prompt the attachment options dialogs.

Add Location

You can add location to your comment. Tap the location icon to add your current location to the comment. The location value is displayed below your comment.

Share Post

Tap the share icon to display the Share Post screen:



You can:

- Add more content or edit the post message
- Share it with specific users or groups
- Add attachments
- Add a location
- Share the post message

Cancel Share Post

Tap the back icon to close the dialog. You remain on the post details screen.

Delete Post

Tap the delete icon to delete the post message**.** A Delete Post warning message is displayed. Tap **Yes** to confirm. The post message is removed from within the application. Tap **No** to cancel. The Delete Post dialog is closed. You remain on the post details screen.

Cancel

Tap **Cancel** to close the dialog. You remain on the post details screen.

Search Posts

You can search for particular posts on the posts screen:

As you start entering text, matching results are displayed.

Tap **X** to clear the search input area. Tap the back icon to return to the posts screen.

Connections

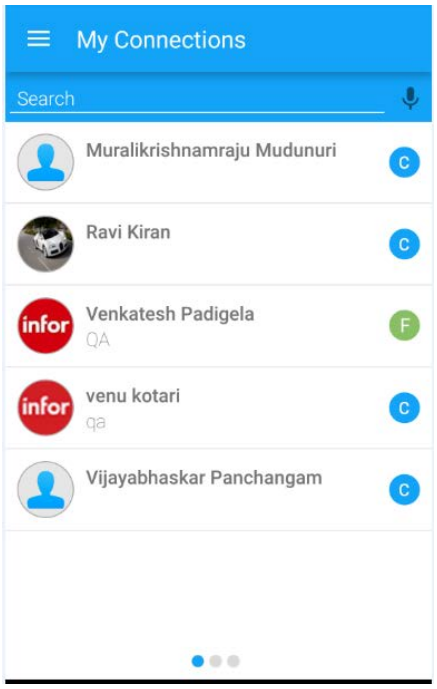
The connections section has these screens.

- My Connections
- My Groups
- Directory

My Connections

The My Connections screen displays a list of these users:

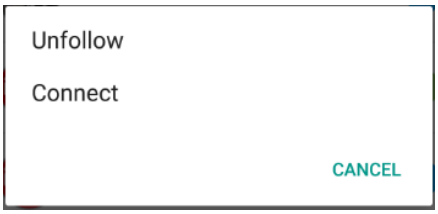
- All users with whom you have connected
- All uses whom you are following
- All users who are following you



If you are connected to a user, tap C to display this dialog:

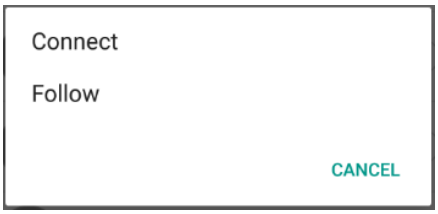
Tap **Disconnect** to disconnect the user. Tap **Cancel** to close the dialog.

If you are following a user, tap F to display this dialog:



Tap **Unfollow** to stop following the user or tap **Connect** to send a connection request to the user. Tap **Cancel** to close the dialog.

If you are followed by a user, tap F to display this dialog:

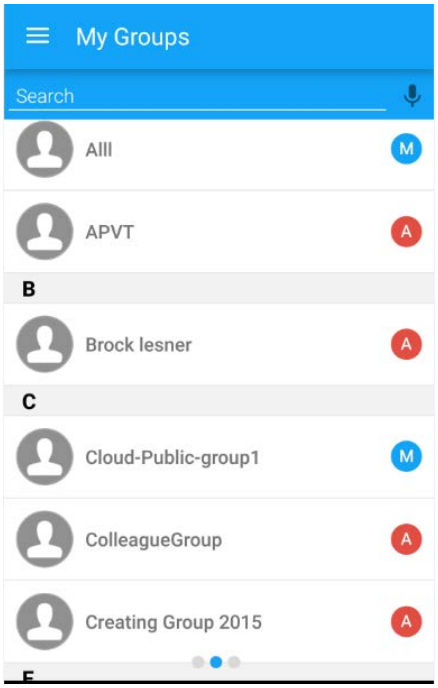


Tap **Follow** to start following the user or tap **Connect** to send a connection request to the user. Tap **Cancel** to close the dialog.

My Groups

The My Groups screen displays a list of these groups:

- All groups of which you are a member
- All groups for which you are a group administrator

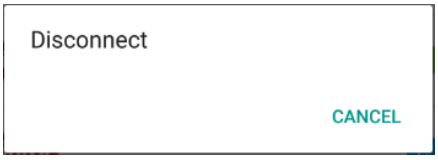


If you are a group member, tap M to display this dialog:

Tap **Disconnect** to disconnect from the group. Tap **Cancel** to close the dialog.

If you are the only group administrator, tapping A displays the group profile screen.

If you are one of multiple group administrators, tapping A displays this dialog:



Tap **Disconnect** to disconnect from the group. Tap **Cancel** to close the dialog.

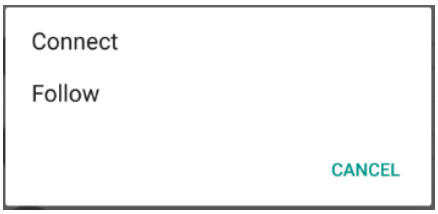
Directory

The Directory screen has a People section and a Groups section.

- Tap **People** to display a list of all users with their current status.
- Tap **Groups** to display a list of all groups with the current status.

People

If you are not connected to a user, tap + to display this dialog:



Tap **Connect** to send a connection request to the user, or tap **Follow** to start following the user. Tap **Cancel** to close the dialog.

If you receive a connection request from a user, tap to display this dialog:

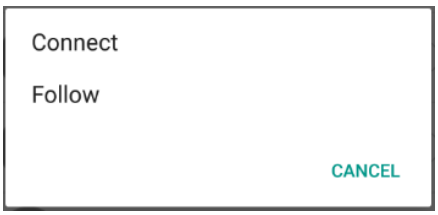
Tap **Accept** to accept the connection request, or tap **Decline** to decline the connection request. Tap **Cancel** to close the dialog.

If you sent a connection request to a user, tap to display this dialog:

Tap **Cancel Request** to cancel the connection request sent to a use or tap **Cancel** to close the dialog.

Groups

Tap + to display this dialog:



Tap **Connect** to connect with the group.

- If it is a public group, you are connected instantly and become a member of the group. The current status changes to M.
- If it is a private group, your request to join the group is sent to the group. The current status changes to .

Tap to display this dialog:

Tap **Cancel Request** to cancel the request sent to the group. The current status changes to . Tap **Cancel** to close the dialog.

Notifications

The notifications screen displays all your notifications. Some notifications have details, which are displayed on the notification details screen. Details include:

- Comments
- Attachments
- Number of Likes to the post

On the notification details screen, you can like/unlike, share, and add comments to the notification post.

You can also delete notifications from the notifications screen.

Notification Details

If a notification has details, a right arrow is displayed in the right corner for the notification. Tap the right arrow to go to the notification details screen. You can view the notification post, along with any additional comments and attachments.

View Notifications/Post Attachments

You can view the attachments, if any, of the notification post. Tap the camera icon to view the image attachments. Tap the file icon to view the file attachments.

When you click a file attachment, the attachment is opened in the external application for that type of attachment. You may be prompted to download an external application to view the attachment if your device cannot open the supported file types.

Like/Unlike Notification Post

Tap the heart icon ♡, to like a post. If another user likes your post, you receive a notification. If you tap the heart icon for a post, the like count is increased by a number and the total number of likes is displayed next to the heart icon.

Tap the same heart icon to unlike a post. If you tap the heart icon for a post, the like count is decreased by a number, and the updated total number of likes is displayed next to the heart icon.

Add Comment

You can add a comment to the notification post. On the notification details screen, you can add the comment to the post. When you start entering the text, the file, camera, and location icons and the **Post** option become active.

Add Attachments

You can add attachments to your comment. Tap the file and camera icons to prompt the attachment options dialogs.

Add Location

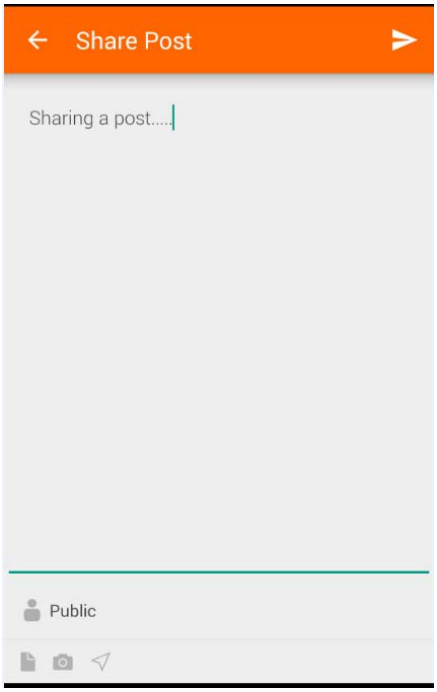
You can add a location to your comment. Tap the location icon to add your current location to the comment. The location value is displayed below your comment.

Actions

From the notification details screen, you can share a post and delete a post, if it is your own post.

Share Post, from Notifications

Tap the share icon to display share post screen and tap send icon to share the post:



You can:

- Add more content or edit the post message
- Share it with specific users or groups
- Add attachments
- Add a location
- Share the notification post

Cancel Share Notification Post

Tap the back arrow on the top navigation to close the share post screen. You remain on the details screen.

Delete Post

Tap the delete icon . Deleting the notification post removes it from within the application.

Cancel

Tap the back arrow on the device to close the details screen. You return to the notifications screen.

Delete Notification

You can delete notifications from the notifications screen. Tap a notification and hold to display **Delete** on the screen. Tap **Delete** to delete the notification. The selected notification is removed from the notifications screen.

Search Notifications

You can search for particular notifications on notifications screen:

As you start entering the text, matching results are displayed.

Tap **X** to clear the search input area. Tap the back icon to return to the notifications screen.

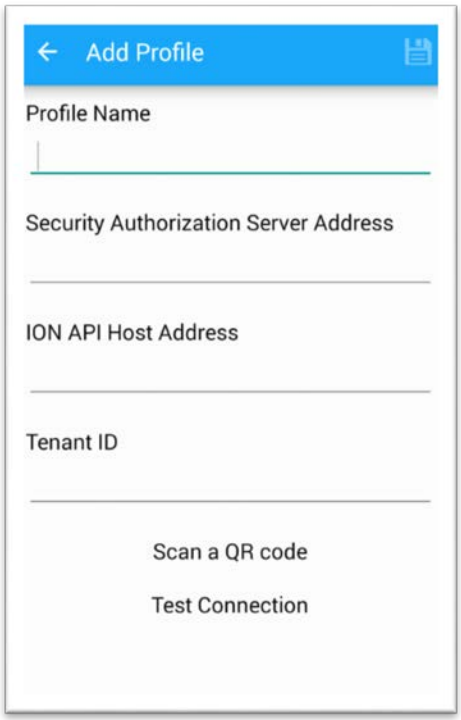
Manage profiles

You can manage your profiles on the Profiles screen where you can do these tasks:

- Add a new profile
- Set a profile as the default profile
- Edit a profile
- Delete profile

Adding a new profile

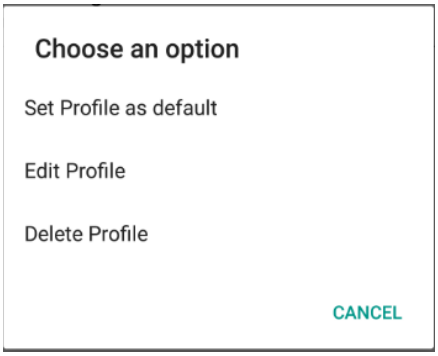
To add a new profile to the Profiles screen, tap the plus icon to display the Add Profile dialog and tap **Scan a QR code** to scan a QR code:



Setting the profile as the default

When you add the first profile, it is set as your default profile.

You can change your default profile only when you have more than one profile on the Profiles screen. To set another profile as the default, tap the profile to display this dialog:



Tap **Set Profile as default** to set this profile as the default.

Editing the profile

Tap **Edit Profile** on Profiles screen to go to the Edit Profile screen. You can edit only the profile name.

Deleting the profile

Tap **Delete Profile** to delete a profile from the Profiles screen.