Infor Ming.le Mobile Application User Guide - iOS

Release 12.0.7

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Getting started

Infor Ming.le™ Application is a mobile application that runs on the iOS iPhone and other iOS devices. We support these versions of iOS:

- 9.3
- 10.0

Infor Ming.le Application consists of these parts:

- Users
- Groups
- Alerts
- Tasks
- Workflows
- Posts
- Connections
- Notifications
- Streams (available only on iPad devices)

Downloading the Infor Ming.le application

You can download the Infor Ming.le application for iOS devices from the App store.

VPN connection

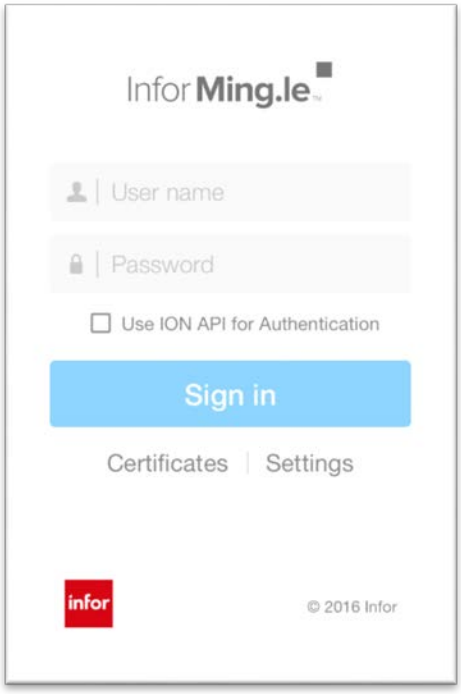
Depending on the configuration of your infrastructure, you may need to use a VPN (virtual private network) to connect to the Infor Ming.le mobile application. Check with your IT department or system administrator for more information.

Installing

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

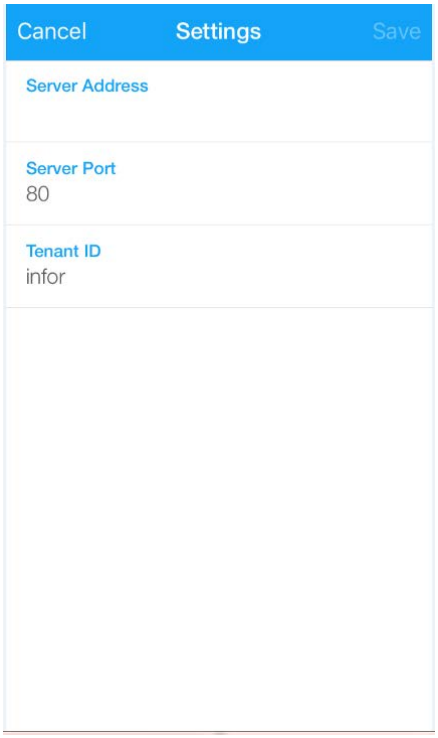
Configuring your application

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:

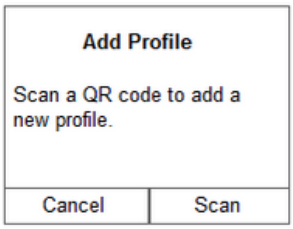
- For the **Server Address**, specify ***<Protocol>://<hostname>***.
- For the **Server Port**, specify ***<portnumber>***.
- For the **Tenant ID**, specify **Infor**.

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

4 Tap **Cancel** 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:

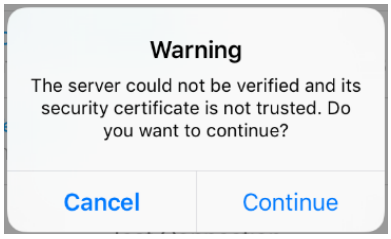


2 Tap **Scan**. The camera on your device is activated.

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.

Note: If your server is using a self-signed (untrusted) certificate, this dialog is displayed:



5 Tap **Continue** to trust the certificate and validate the connection.

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

7 Tap **Done** to go back to the Sign in screen.

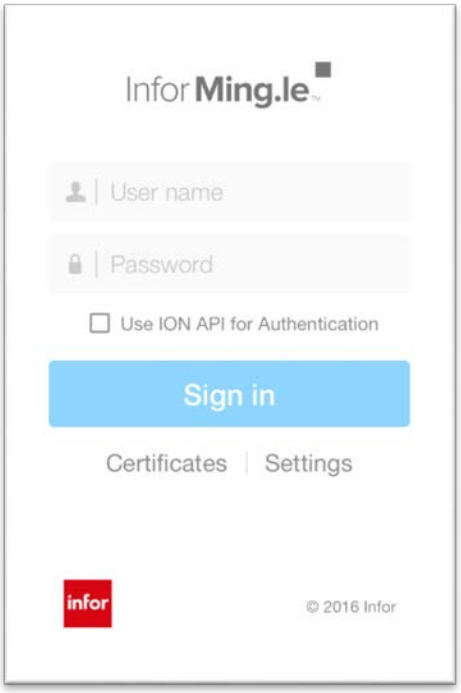
Signing in

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.

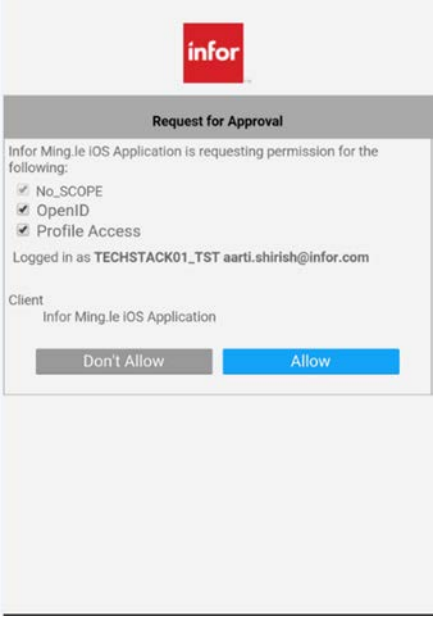
4 If you want to reconfigure your settings, tap **Settings** to open the Settings or Profiles screen, based on your selection. See the “Configuring your application” section above.

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.

Setting up your Apple Watch

To get started with your Apple Watch, you must pair and sync it with your iPhone device.

If the Infor Ming.le mobile application is already available on your iPhone device, when you pair and sync your Apple Watch with your iPhone device, the Infor Ming.le mobile application is available on Apple Watch immediately.

Synching your Infor Ming.le mobile application

If the Infor Ming.le mobile application is not available on your iPhone device at the time of pairing and syncing your Apple Watch with your iPhone device, download and install the Infor Ming.le mobile application on your iPhone device.

On your iPhone, go to the App Store and download the Infor Ming.le mobile application. Tap **Install** to install the mobile application. For a successful installation, the mobile application is installed on both the iPhone and Apple Watch.

Apple Watch functionality

Navigation

Tap the Infor Ming.le icon to open the application. Swipe left or right to navigate to the Alerts, Tasks, Posts, and Notifications categories. For each category, at the bottom of the icon, the total number of notifications and the last updated date and time are displayed.

Tap and hold the Notifications icon to refresh the count. After refreshing, the updated count and the last updated date and time are displayed.

Notifications

To display Infor Ming.le notifications on your Apple Watch, note these preconditions:

- The Infor Ming.le mobile application should be running in the background on your iPhone device.
- Your iPhone device should be in a locked state.

The type of notifications displayed on the Apple Watch are:

- Connection requests sent to you
- Requests sent to you to join a group

- Posts to a group to which you belong
- Comments on your posts
- Other user comments to a post on which you commented
- Someone has tagged you in a post
- A new task has been created
- A task is escalated
- A new alert has been created
- An alert has been escalated

Signed out

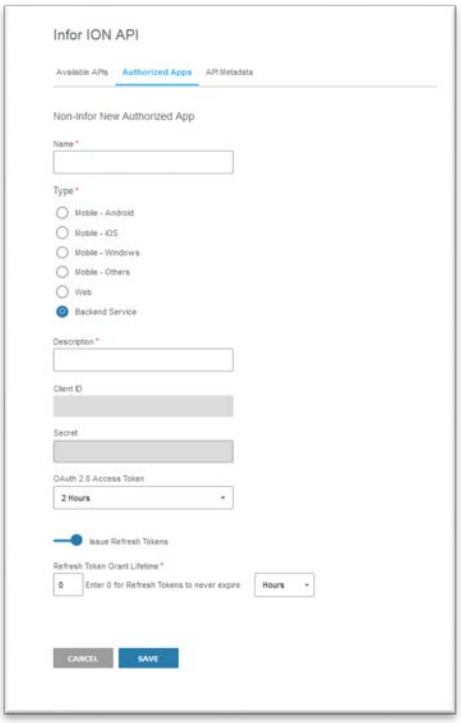
If you have signed out of the Infor Ming.le mobile application on your iPhone and are trying to access the mobile application on your Apple Watch, a message is displayed requesting that you sign in to the Infor Ming.le mobile account on your iPhone.

Configuring your tenant with the push notifications service for on-premises edition

You must configure your tenant to use the push notifications functionality for Infor Ming.le mobile applications.

To set up the push notifications feature:

1. Ask your administrator to create Cloud Edition tenant only for you.
2. Create a new authorized app as a backend service in the ION API portal in the Cloud Edition tenant only:
   a. Select **ION API** > **Add New App** > **Backend Service**.



   b. Complete the required fields.
   c. Click **Save**.
3. Download the credentials and save the .ionapi file locally.
4. Log into your Infor Ming.le on-premises edition.
5. From the User Menu, select **Admin Settings** > **General Settings**.
6. Select the **Enable Push Notification Service** check box.

7 Click **Upload Credentials** to upload the .ionapi file that you downloaded in Step 3:

8 Save your settings.

Note: Every time you download the credentials from this authorized app (**Backend Service**) created in the Cloud Edition tenant, a new credentials (.ionapi) file is created, and at the same time, the previously uploaded credentials become invalid. Therefore, whenever you download the credentials, make sure you also upload the newly downloaded file to use the push notifications service.

Configuring your tenant with push notifications service for Cloud Edition

You do not need to configure your tenant to use the push notifications functionality for Infor Ming.le mobile applications as the tenant is configured automatically at the time of tenant provisioning.

Peek & Pop

The Infor Ming.le mobile application supports the Peek & Pop feature on iPhone 6s, 6s Plus, 7 and 7 Plus. To use this functionality, turn on the **3D Touch** setting on your iOS device.

Use Peek & Pop to preview all kinds of content and act on it without opening it. Tap harder to pop into the content in the mobile app.

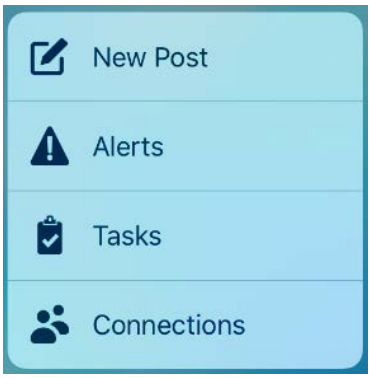
With this implementation, tapping the supported items with increased pressure on a 3D Touch-enabled device displays a peek preview of another view controller. Use more pressure to pop to the view controller.

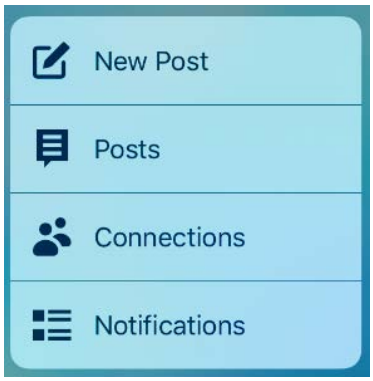
Quick Actions

Use Quick Actions to do the things that you do most often, faster and with fewer steps. Many of these actions can be done with one tap from the home screen.

On the home screen, tap the Infor Ming.le mobile application icon with varying degrees of pressure to reveal the list of quick actions. The quick actions are turned on only after you are authenticated. Depending on your security role, the quick actions are dynamically displayed:

- Alerts
- Tasks
- New Post
- Posts
- Connections
- Notifications





You can preview a user's or group's profile by 3D touching the user's or group's name anywhere in the application.

Hamburger menu

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

Navigation

The left Infor Ming.le Application navigation menu has the following 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 alerts

Tasks

Tap **Tasks** to access the tasks screen and the workflows screen. From here, you can review and manage the list of tasks and workflows, 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 tasks
- 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 (available from 12.0.0)

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

Streams (available only on iPad devices)

The Streams feature on the mobile application is available only if you connect to Infor Ming.le 12.0.5 (on premises) or later.

Tap **Streams** to access the streams screen. From here, you can review the list of all stream instances, and perform these actions:

- Create a new stream instance
- Start a stream instance
- Save/Cancel a new stream instance
- Edit a stream instance
- Complete a stream instance
- Restart a stream instance
- Delete a stream instance
- Cancel a stream instance
- Join a stream instance
- Leave a stream instance
- Add a new step to the stream
- Start a stream step
- Add attachments to a step
- Add comments to a step
- Edit a stream step
- Complete a stream step
- Resume a stream step
- Delete a stream step
- Reorder the stream steps
- Input data in the widgets

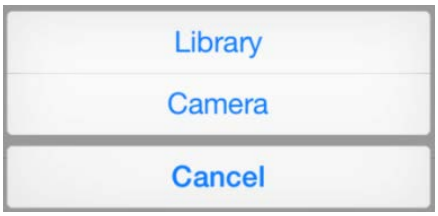
Signing out

Tap **Sign Out** to sign out of the Infor Ming.le 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 department, email address, and, if listed, phone numbers. The **Posts** tab displays all your posts, along with any posts you are tagged in.

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



Library

Tap **Library**. The photo library on your device is displayed. You can select an existing image to display it in a boxed area. You can crop the image by using the box. Tap **Done** to upload the new image.

Camera

Tap **Camera**. The camera on your device becomes active. You can take a new profile image, and it will be displayed in a boxed area. You can crop the image by using the box. Tap **Use Photo** to upload the new image. Tap **Retake** to take another image. Tap **Cancel** from **Retake** to close the Camera option.

Cancel

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

Users

Use the Infor Ming.le 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.

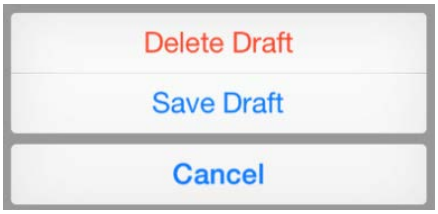
Email

You can email any user within the application by tapping **Email** from the selected user's profile screen. A new message screen is displayed with the user's email address.

Enter additional email addresses to copy other users, enter a subject, and type a message. Tap **Send** to send the email. The new message screen closes, and you return to the selected user's profile screen.

Cancel email

If you tap **Cancel** from the navigation bar, these options are displayed:



Delete Draft

Tap **Delete Draft**. Your email draft is discarded. The new message screen closes, and you return to the selected user's profile screen.

Save Draft

Tap **Save Draft**. Your email draft is saved. The new message screen closes, and you return to the selected user's profile screen.

Cancel

Tap **Cancel**. The dialog box closes, and you remain on the new message screen.

Phone call

You can call any user within the application by tapping an available phone number from the selected user's profile screen. A Call (User Name) dialog is displayed.

Tap **Yes** to call the user. Tap **No** to close the dialog.

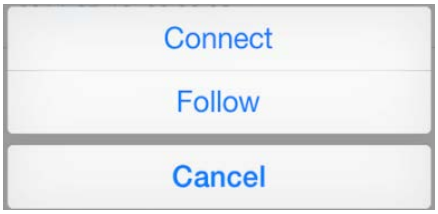
Connection status

The user's profile screen displays your connection 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.

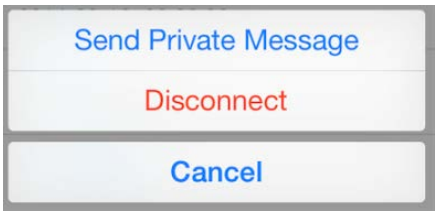
The user's profile now displays **Request Sent**.

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

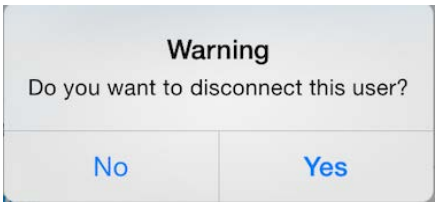
When you are connected to other users, you can send private messages. Tap **Connected** from the user's profile screen to display this dialog:



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 the options and tap **Disconnect** to display this message:



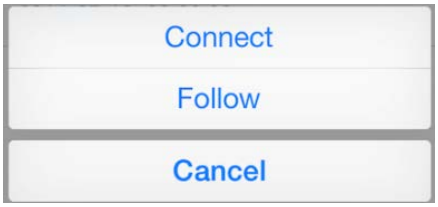
Tap **Yes** to close the message. You remain on the user's profile screen. Your connection status shows **Connect**; you will be able to see only the user's posts to public groups.

Tap **No** to close the message. You remain on the user's profile screen.

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

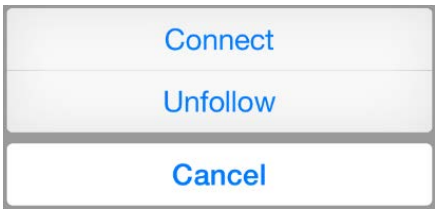
Follow

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. The connection status changes to **Following**. When you are following a user, you can see the user's public posts.



Unfollow

When you are following another user, you can select to stop following the user. Tap **Unfollow** from the user's profile screen. The connection status changes to **Connect**. You can no longer see any of the user's public posts.



Cancel

The dialog box closes and you remain on the user's profile screen.

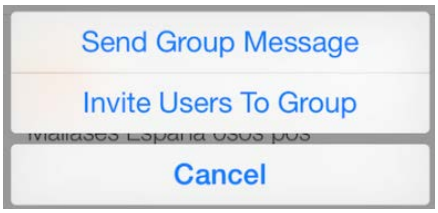
Groups

The Infor Ming.le 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 members can view the posts.

The group screen includes the group name, privacy setting, tabs for account information, and all posts for that group.

If you scroll the group's screen, you can see a list of all group members. You can also access the member's profile by tapping the name or photo.

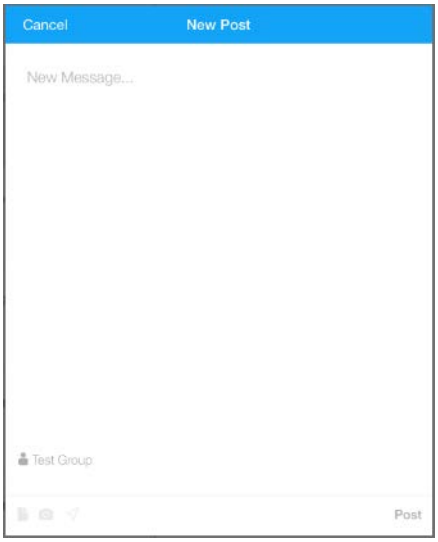
If you are a group member, tap the action icon to display this dialog:



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

Send Group Message

To send a message to a group, tap **Send Group Message** to display the new post screen. The audience is preset to **Group Name**. You can also attach attachments and add location details to the message. Only members of the group receive the message.



Type your message and tap **Post**.

Invite Users to Group

To invite users to join a group, tap **Invite Users to Group** to display the colleagues screen. Tap users from the list to select them and tap **Done**.

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

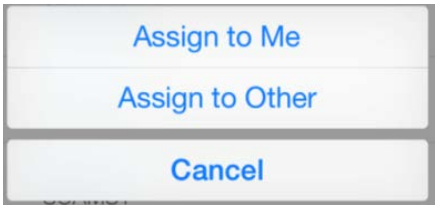
Alerts

The alerts screen displays the most recent alerts. You can also filter by category by selecting a category from the **Filter** list. 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:



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**. A user list is displayed, and you can assign the task to another user. When assigned to another user, the alert is removed from the list.

Unassign, only if Assigned to Me

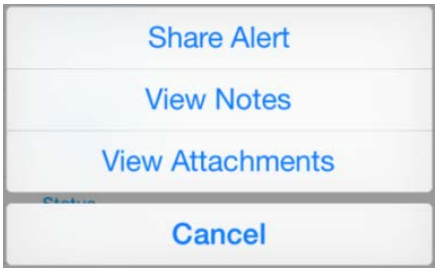
Tap **Unassign**. The alert is removed from your alert list, and other users can select it. The assign icon is no longer shaded.

Cancel

Tap **Cancel**. The assignment dialog is closed, and you are returned to the previous screen.

Actions, if 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 or edit the alert
- Share it with specific users or groups
- Add attachments
- Add a location
- Post

Cancel Share Alert

Tap **Cancel** and confirm **Yes** to return to the alert details screen.

Add Note/View Notes

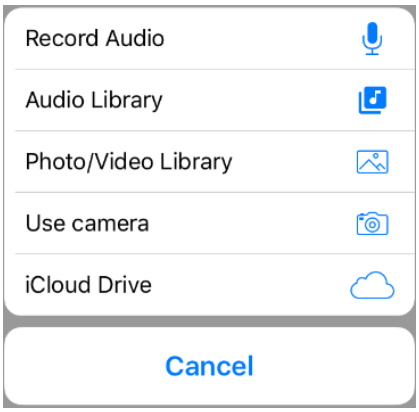
If notes do not exist, **Add Note** is displayed. If notes exist, **View Notes** is displayed.

Tap **Add Note** or **View Notes** to access the notes screen. After you type in the New Note section of the screen, **Add Note** is displayed on the right. Tap **Add Note** 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 an attachment exists, **View Attachments** is displayed.

If attachments do not exist, tap **Add Attachment** to prompt the attachment options 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 **Done** 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/Video Library

Tap **Photo/Video Library**. The photo and video library on your device is displayed. You can select one or more existing photos or videos. Tap **Done** to upload the selected photo or video to your alert. It is displayed as an attachment on the Attachments screen.

Use Camera

Tap **Use Camera**. The camera on your device becomes active. You can take either a photo or a video by changing the mode. Tap **Use Photo** to upload the new photo, or tap **Use Video** to upload the new video to your alert. It is displayed as an attachment on the Attachments screen. Tap **Retake** to take another photo or video.

iCloud Drive

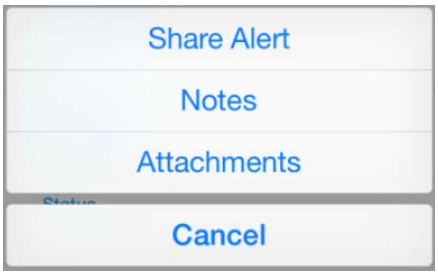
Tap **iCloud Drive** to securely access all of your documents in iCloud on your iOS device. You can select one or more files from the iCloud. Tap **Done** to attach the selected files to your post.

Cancel

The dialog box closes, and you remain on the Attachments screen.

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
- Post

Cancel Share Alert

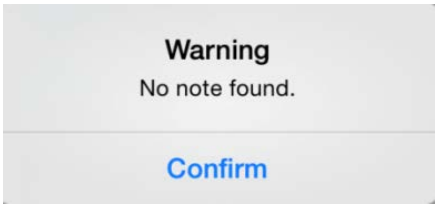
Tap **Cancel** and confirm **Yes** to return to the alert details screen.

Notes/View Notes

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

Notes

If notes do not exist, a warning message is displayed:



Tap **Confirm** to close the message.

View Notes

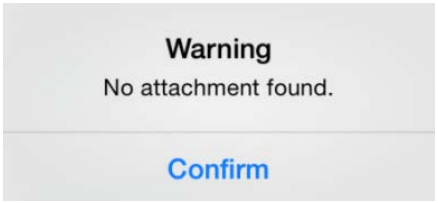
Tap **View Notes** to access the notes screen where all existing notes are displayed. If the alert is not assigned to you, you cannot create a new note.

Attachments/View Attachments

If attachments do not exist, **Attachments** is displayed. If attachments exist, **View Attachments** is displayed.

Attachments

If attachments do not exist, a warning message is displayed:



Tap **Confirm** to close the message.

View Attachments

If attachments exist, tap **Attachments** to access the attachments screen where all existing attachments are displayed. If the alert is not assigned to you, you cannot add a new attachment.

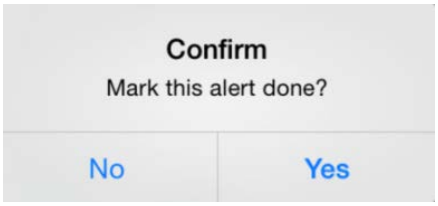
Cancel

Tap **Cancel** to close the dialog and return to the alert details screen.

Mark as Done

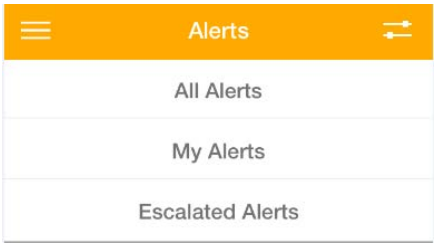
If a task is assigned to you, you can to mark it as **Done** on the alert details screen.

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



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

Filter



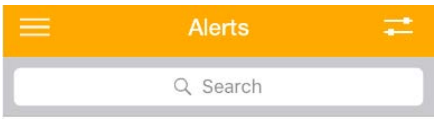
Tap the filter icon from the top navigation to display the filter options:

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

Tap any of the options to filter the alerts accordingly.

The top navigation also displays the filtered selection.

Search



Pull down on the alerts screen to display the Search toolbar.

As you start entering text, matching results are displayed.

Tap **X** to clear the search input area. Tap **Cancel** to close the Search toolbar.

Tasks

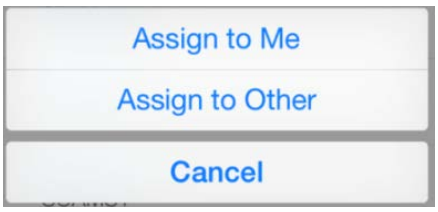
The Tasks section has Tasks and Workflows features.

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 by category by selecting a category from the **Filter** list.

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

Assignment

Tap the assign icon to change the assignment. A dialog is displayed:



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.

Drill down 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 task details screen. Tap the right arrow to drill down the values. Tap further down 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

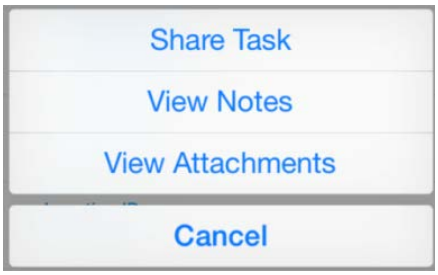
Tap **Assign to Other**. A user list is displayed, and you can assign the task to another user. After the task is assigned to another user, it is removed from the list.

Cancel

Tap **Cancel**. The assignment dialog options are closed and you are returned to the previous 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
- Post

Cancel Share Task

Tap **Cancel** and confirm **Yes** to return to the task details screen.

Add Note/View Notes

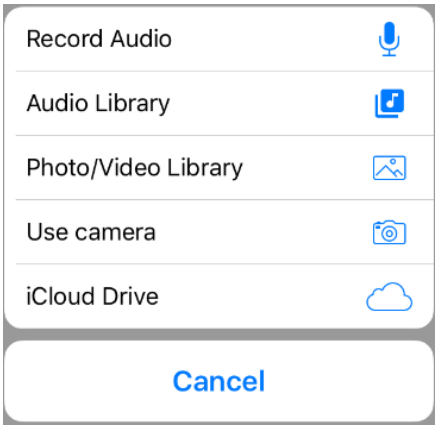
If notes do not exist, **Add Note** is displayed. If notes exist, **View Notes** is displayed.

Tap **Add Note** or **View Notes** to access the notes screen. After you type in the New Note section of the screen, **Add Note** is displayed on the right. Tap **Add Note** 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 an attachment exists, **View Attachments** is displayed.

If attachments do not exist, tap **Add Attachment** to prompt the attachment options 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 **Done** 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/Video Library

Tap **Photo/Video Library**. The photo and video library on your device is displayed. You can select one or more existing photos or videos. Tap **Done** to upload the selected photo or video to your task. It is displayed as an attachment on the Attachments screen.

Use camera

Tap **Use Camera**. The camera on your device becomes active. You can either take a photo or a video by changing the mode. Tap **Use Photo** to upload the new photo or tap **Use Video** to upload the new video to your task. It is displayed as an attachment on the Attachments screen. Tap **Retake** to take another photo or video.

iCloud Drive

Tap **iCloud Drive** to securely access all of your documents in iCloud on your iOS device. You can select one or more files from the iCloud. Tap **Done** to attach the selected files to your post.

Cancel

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

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

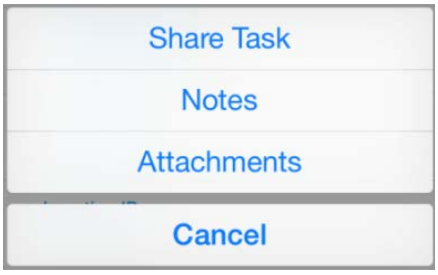
Tap **Cancel** and confirm **Yes** to return to the task details screen.

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
- Post

Cancel Share Task

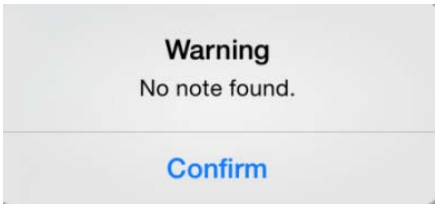
Tap **Cancel** and confirm **Yes** to return to the alert details screen.

Notes/View Notes

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

Notes

If notes do not exist, a warning message is displayed:



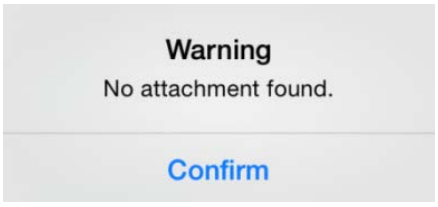
Tap **Confirm** to close the message.

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.

Attachments

If attachments do not exist, a warning message is displayed:



Tap **Confirm** to close the message.

View Attachments

If attachments exist, tap **Attachments** to access the attachments screen where all existing attachments are displayed. If the task is not assigned to you, you cannot add a new attachment.

Cancel

Tap **Cancel** to close the dialog and return to the task details screen.

Take Action

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

When you tap **Action**, these options are displayed:

Approve

Tap **Approve**. The task is removed from your task list. The action is marked server side.

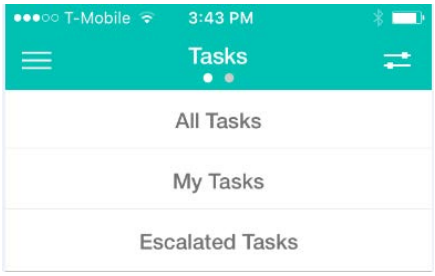
Reject

Tap **Reject**. The task is removed from your task list. The action is marked server side.

Cancel

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

Filter



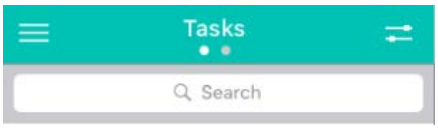
Tap the filter icon from the top navigation to display the filter options:

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

Tap any of the options to filter the tasks accordingly.

The top navigation also displays the filtered selection.

Search



Pull down on the tasks screen to display the Search toolbar.

As you start entering text, matching results are displayed.

Tap **X** to clear the search input area. Tap **Cancel** to close the Search toolbar.

Workflows

Workflows are part of the Tasks section. Swipe left to go to the 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 workflow to display the details screen, which also includes a summary and the parameters of the workflow.

Tap the filter icon from the top navigation of the Workflows screen to display all of the workflow categories:

- All
- Running
- Completed
- Canceled
- Failed

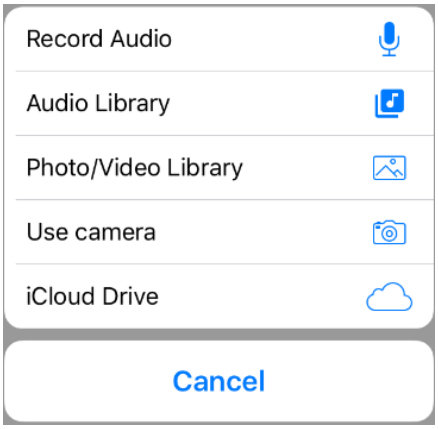
Tap a category to display the workflows for that category.

Start 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 **Done** to attach this audio file to your workflow.

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/Video Library

Tap **Photo/Video Library**. The photo and video library on your device is displayed. You can select one or more existing photos or videos. Tap **Done** to attach the selected photo or video to your workflow.

Use camera

Tap **Use Camera**. The camera on your device becomes active. You can either take a photo or a video by changing the mode. Tap **Use Photo** to upload the new photo or tap **Use Video** to upload the new video to your workflow. Tap **Retake** to take another photo or video.

iCloud Drive

Tap **iCloud Drive** to securely access all of your documents in iCloud on your iOS device. You can select one or more files from the iCloud. Tap **Done** to attach the selected files to your workflow.

Cancel

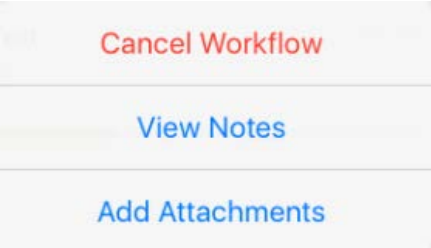
Tap **Cancel**. The dialog box closes, and you remain on the New Workflow screen.

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:



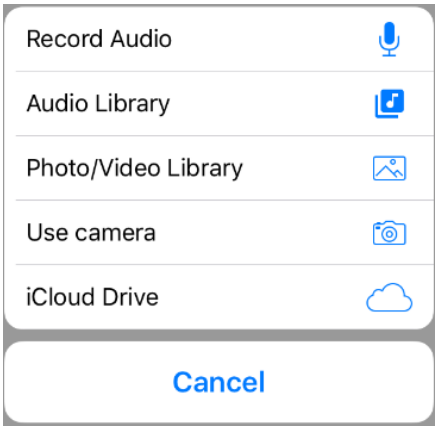
Tap **Cancel Workflow**. The workflow is now canceled and the status of the workflow changes to Canceled.

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.

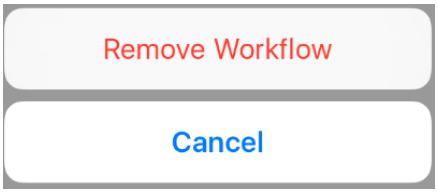
Add Attachments

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



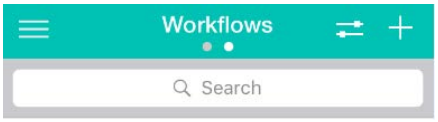
Remove a Workflow

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



Pull down on the workflow screen to display the Search toolbar.

As you start entering text, matching results are displayed.

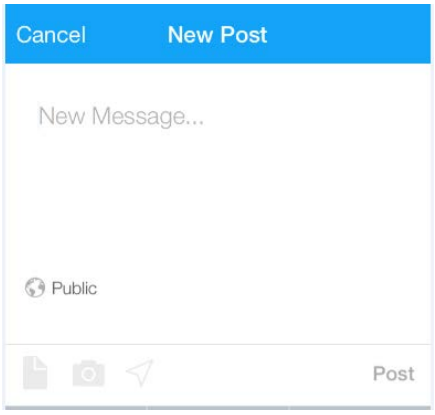
Tap **X** to clear the search input area. Tap **Cancel** to close the Search toolbar.

Posts

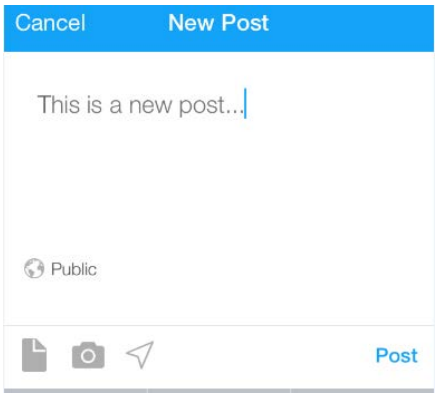
The post screen displays the most recent posts. Each post has options that are displayed when you open the post, such as adding a comment and sharing the post.

Create Post

To create a post, tap the notepad/pencil icon. This screen is displayed:



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



When creating a new post, you can tag a user or group within your post by using the @ sign. When you type a letter next to @ in the input area, a list of matching users or groups is displayed.

When you select the user or group, the name is highlighted in the post. The user or group receives a notification about being mentioned in the post.

Privacy Level

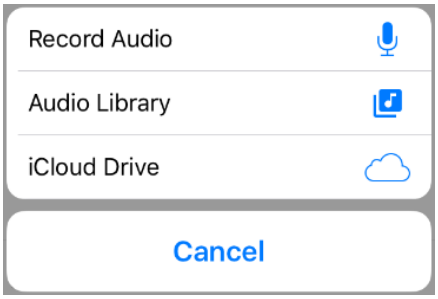
Tap **Public** in the area below the New Post section to change the privacy level of the post. Tap **Public** to display different options for the visibility of the post. Tap the options or **My Groups** to determine the audience for the post. Only the chosen users or group can see the post.

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 **Done** 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 on your device are displayed, if any. 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.

iCloud Drive

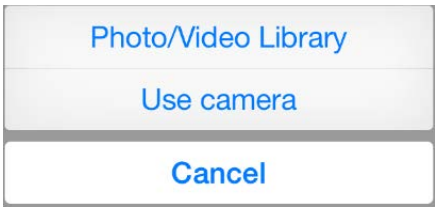
Tap **iCloud Drive** to securely access all of your documents in iCloud Drive on your iOS device. You can select one or more files from the iCloud. Tap **Done** to attach the selected files to your post.

Cancel

Tap **Cancel** to close the dialog. You remain on the new post 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/Video Library

Tap **Photo/Video Library**. The photo and video library on your device is displayed. You can select one or more existing photos or videos. Tap **Done** to upload the selected photo or video. It is displayed as an attachment to your post.

Use camera

Tap **Use Camera**. The camera on your device becomes active. You can either take a photo or a video by changing the mode. Tap **Use Photo** to upload the new photo or tap **Use Video** to upload the new video. It is displayed as an attachment to your post. Tap **Retake** to take another photo or video.

Cancel

Tap **Cancel** to close the dialog. You remain on the new post 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 **Post** to post your new message to the user or group specified within your post. Your post is also displayed on the Posts section of your profile screen.

Cancel

Tap **Cancel** and confirm **Yes** to return to the posts screen. 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 with location details, if any, along with any additional comments, likes, and attachments.

Add Comment

On the post details screen, you can add a new comment to the current post. When you start entering the text, the file, camera, location icons and **Post** become active. You can also tag specific users to your comment.

Add Attachment

You can add 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.

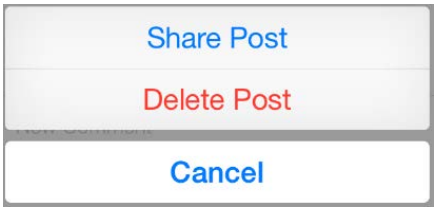
Like/Unlike Post

Tap 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.

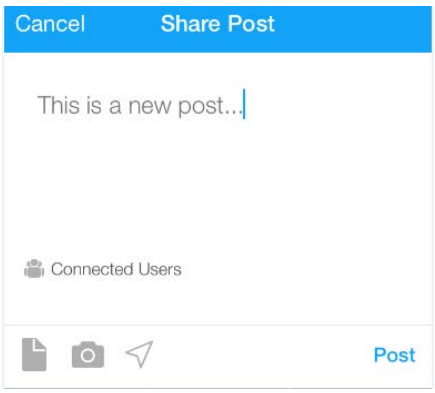
Tap the same heart icon to unlike a post. If you tap the heart icon for a post, the like count is decreased by a number and the updated total number of likes is displayed next to the heart icon.

Actions

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



Share Post



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

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

Cancel Share Post

Tap **Cancel** and confirm **Yes** to return to the post details screen.

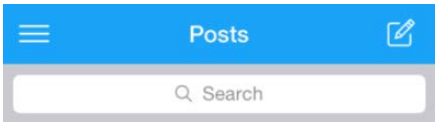
Delete Post

Tap **Delete Post**. Deleting the post removes it from within the application.

Cancel

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

Search



Pull down on the posts screen to display the Search toolbar.

As you start entering text, matching results are displayed.

Tap **X** will clear the search input area. Tap **Cancel** to close the Search toolbar.

Connections

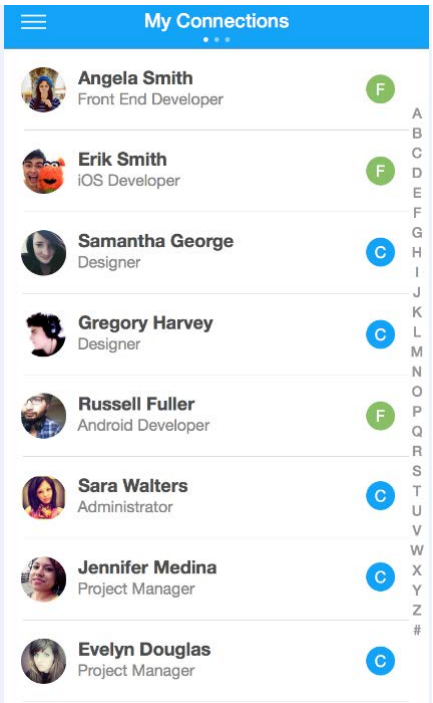
The connections section has these screens.

- My Connections
- My Groups
- Directory

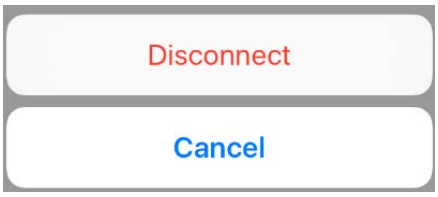
My Connections

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

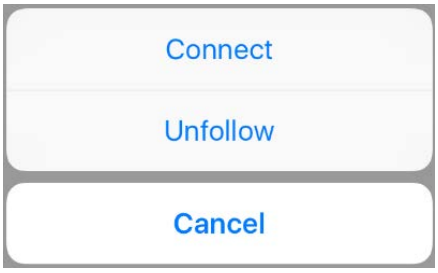


If you are connected to a user, tap C to display this dialog:



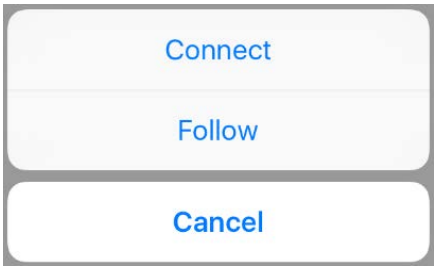
Tap **Disconnect** to disconnect the user. Tap **Cancel** to close the dialog.

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:

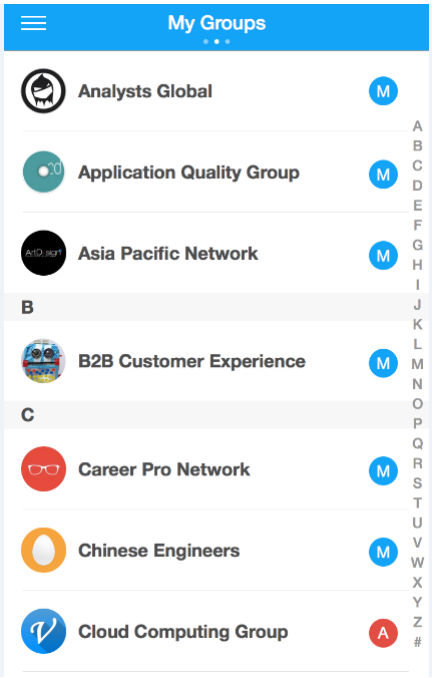


Tap **Follow** to start following the user or tap **Connect** to send a connection request to the user. Tap **Cancel** to close the dialog.

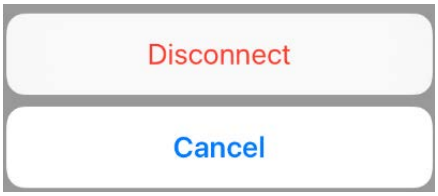
My Groups

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



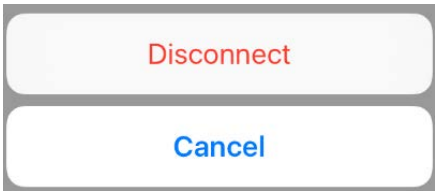
If you are a group member, tap M to display this dialog:



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 the group administrators, tapping A displays this dialog:



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

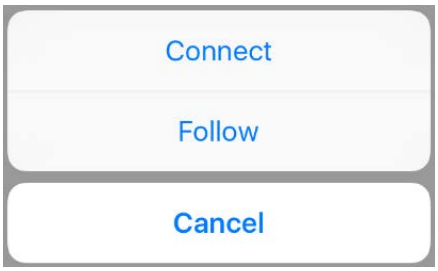
Directory

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.

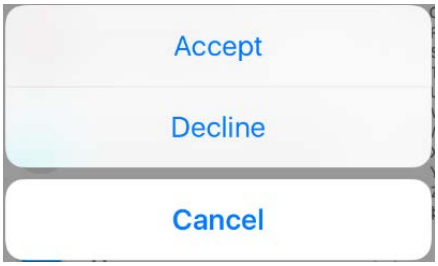
People

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



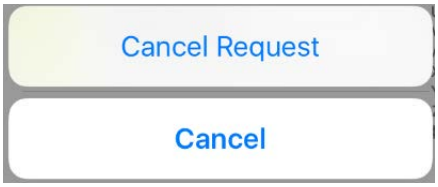
Tap **Connect** to send a connection request to the user, or tap **Follow** to start following the user. Tap **Cancel** to close the dialog.

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.

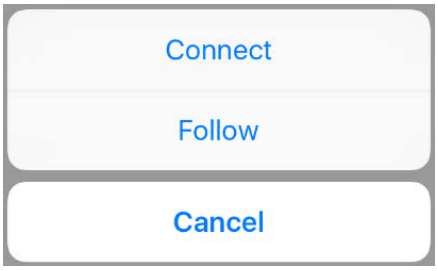
If you sent a connection request to a user, tap to display this dialog:



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

Groups

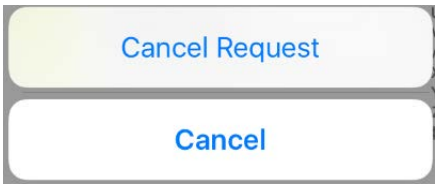
Tap + to display this dialog:



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.

Push Notifications

Push notifications functionality is available on your mobile device only if your mobile application is configured to Infor Ming.le 12.0.3 or later.

These are the types of notifications also displayed on the device lock screen if it is locked or if it is not locked but displayed as a banner:

- Connection requests sent to you
- Requests sent to you to join a group
- Posts to a group, to which the user belongs
- Comments on your posts
- Other user comments to a post on which you commented
- Someone has tagged you in a post
- A new task has been created
- A task is escalated
- A new alert has been created
- An alert has been escalated

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.

Like/Unlike a 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 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 heart icon.

Add Comment

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

Add Attachments

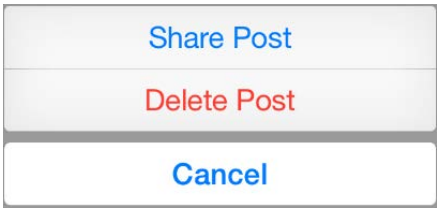
You can add attachments to your comment. Tap the file and camera icons to prompt the attachment options dialogs.

Add Location

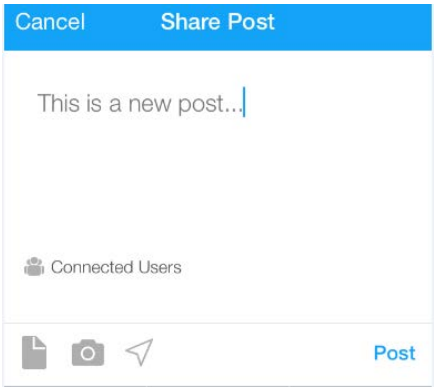
You can add a location to your comment. Tap the location icon to add your current location to the comment. The location value is displayed below your comment.

Actions

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



Share Post, from Notifications



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

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

Cancel Share Post

Tap **Cancel** and confirm **Yes** to return to the alert details screen.

Delete Post

Tap **Delete Post**. Deleting the notification post removes it from the application.

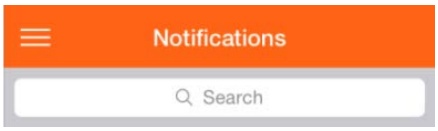
Cancel

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

Delete Notification

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

Search



Pull down on the notifications screen to display the Search toolbar.

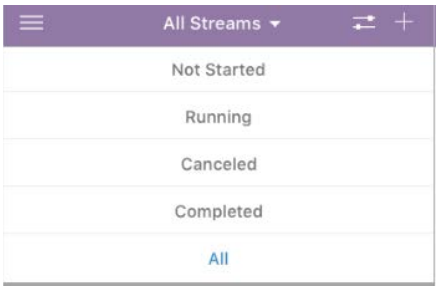
As you enter text, matching results are displayed.

Tap **X** to clear the search input area. Tap **Cancel** to close the Search toolbar.

Streams (available only on iPad devices)

The streams screen displays the list of the stream instances. Tap the drop-down arrow to display the options. You can view the list by selecting **All Streams** or **My Streams** from the drop-down list.

Filter



You can filter the streams list by status by tapping the filter icon and selecting a status from the overlay screen:

- Not Started
- Running
- Canceled
- Completed
- All

Tap the stream to display the stream details screen, which includes the stream name, description, due date, template owners, stream owners, participants, and steps.

Create a New Stream

You can create a new stream instance from your mobile application. Tap the plus icon to display the Choose a Template screen. On the Choose a Template screen, by default, all of your active templates are listed:

You can filter the templates list by **All Templates** or **My Templates**. Tap the template that you want to use. Based on the definition of the template selected, the corresponding details are displayed.

You can customize the stream instance name by tapping Edit on the details panel. When you create a new stream instance, you can do the following:

- Edit the stream name
- Edit the stream description
- Change the privacy level
- Change the due date of the stream
- Add/Delete stream owners, including IFS distribution groups and Infor Ming.le groups
- Add/Delete internal participants, including IFS distribution groups and Infor Ming.le groups
- Add/Delete external participants
- Add/Delete tags

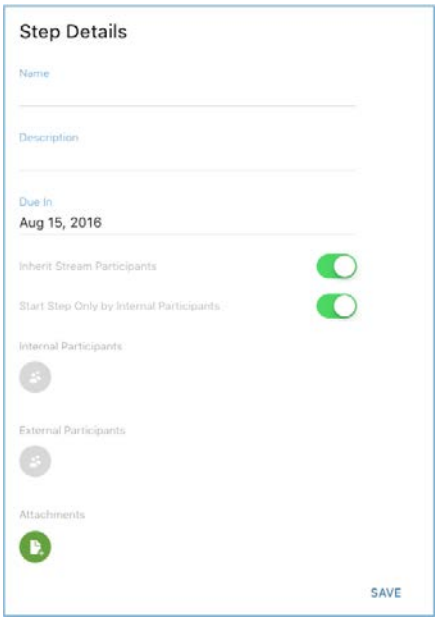
After you finish editing the new stream details, tap **Save** to save the new stream instance or tap **Cancel** to discard the current stream instance.

Add Steps (a new stream instance)

You can add steps when you create a new stream instance.

The Steps panel displays all of the steps, if any steps are added at the template level. Tap **Edit** on the Steps panel to go to the Stream Steps screen.

Tap the plus icon to display the Add Step screen:



On the Add Step screen, enter the necessary details.

Tap **Save** to add the new step to the bottom of the steps list. You can reorder the steps as required.

Tap the plus icon to add another step, or tap **Done** to go back to the Edit Stream screen.

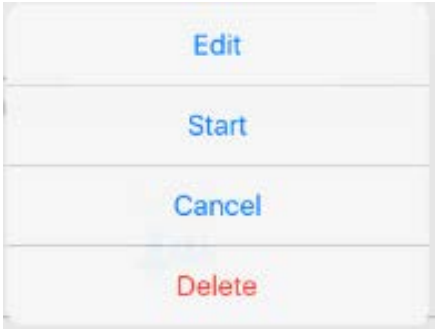
Tape **Done** to go to the Create New Stream screen.

Tap **START NEW STREAM** to start the current new stream instance, or tap **Done** to go back to the streams section.

Start a Stream

To start a stream, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Not Started** status to select it. Tap the action icon to display this dialog:



Tap **Start** to start the stream. The status of the stream changes to **Running**.

Edit a Stream

To edit a stream, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Not Started**, **Running**, **Completed**, or **Canceled** status to select it. Tap the action icon to display the dialog.

Tap **Edit** to edit the stream. On Edit Stream screen, tap **Edit** to open the Stream Details screen where you can edit this information:

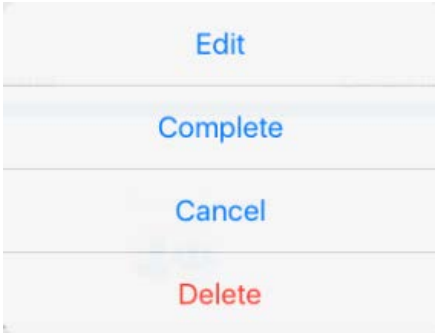
- Name
- Description
- Privacy
- Due Date
- Add/Delete Tags
- Add/Delete Stream Owners
- Add/Delete Internal and External Participants

Tap **Save** to save your changes to the stream. Tap **Done** to go back to the streams section.

Complete a Stream

To complete a stream, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Running** status to select it. Tap the action icon to display this dialog:

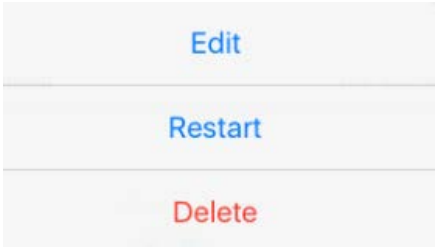


Tap **Complete** to complete the stream. The status of the stream changes to **Complete**.

Restart a Stream

To restart a stream, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Completed** status to select it. Tap the action icon to display this dialog:

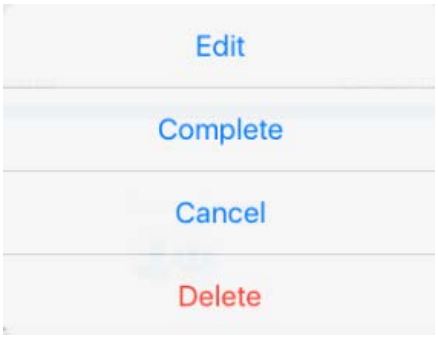


Tap **Restart** to restart the stream. The status of the stream changes to **Running**.

Cancel a Stream

To cancel a stream, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Running** status to select it. Tap the action icon to display this dialog:



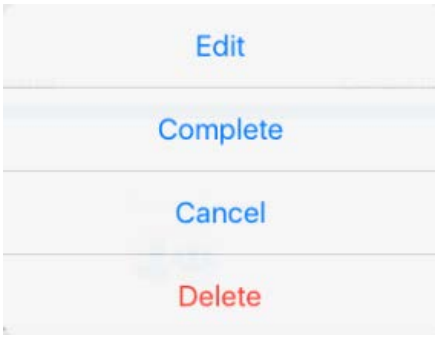
Tap **Cancel** to display the confirmation dialog.

Tap **Yes** to cancel the stream. The status of the stream changes to **Canceled**.

Delete a Stream

To delete a stream, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with any status (**Not Started, Running**, **Completed**, or **Canceled**) to select it. Tap the action icon to display this dialog:



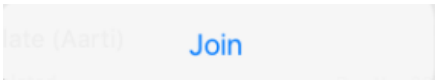
Tap **Delete** to display the confirmation dialog.

Tap **Yes** to delete the stream. The selected stream is deleted from the streams list.

Join a Stream

You can join a public stream if you are not a participant of the stream.

On the left panel of the streams section, tap a stream with a **Not Started** or **Running** status to select it. Tap the action icon to display this dialog:



Tap **Join** to join the stream. You are added to the stream as an internal participant.

Leave a Stream

You can leave a stream if you are an internal participant of the stream.

If you are the stream owner, you cannot leave the stream.

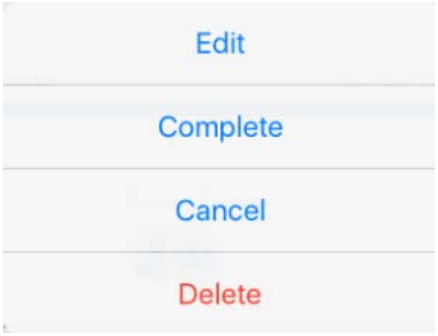
On the left panel of the streams section, tap a stream with a **Not Started** or **Running** status to select it. Tap the action icon to display this dialog:

Tap **Leave** to leave the stream. You are removed from the list of internal participants of the stream.

Reorder Stream Steps

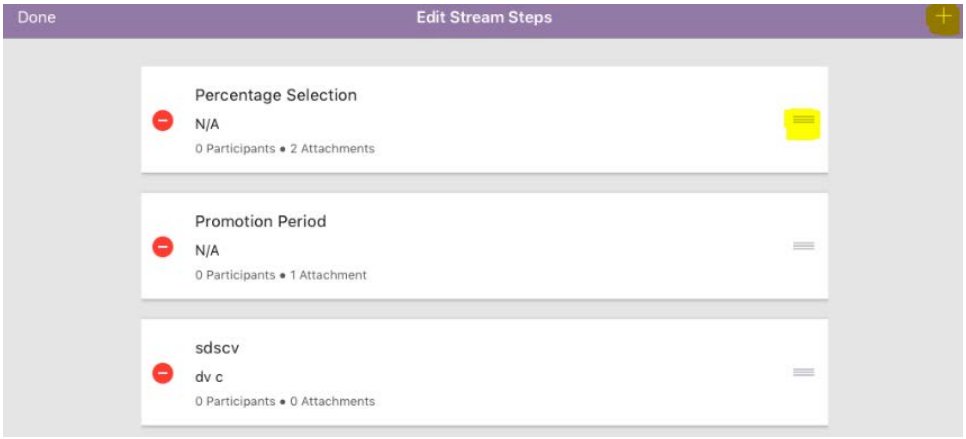
To reorder stream steps, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Not Started** or **Running** status to select it. Tap the action icon to display this dialog:



Tap **Edit** to open the Edit Stream screen.

Tap **Edit** on the Steps panel to go to the Edit Stream Steps screen:



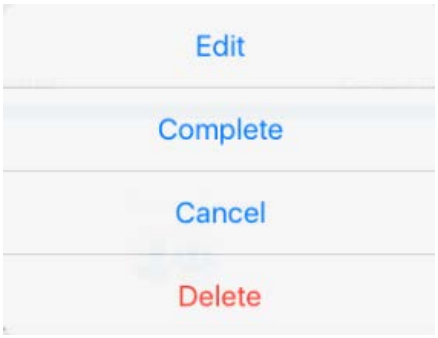
Tap and hold the hamburger icon on the step to move, slide up or down to the location to move the step, and release the icon. You can reorder the steps as often as you want.

Tap **Done** to go back to the Edit Stream screen.

Add Steps (existing stream instance)

To add steps to a stream, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Not Started** or **Running** status to select it. Tap the action icon to display this dialog:



Tap **Edit** to go to the Edit Stream screen.

Tap **Edit** on the Steps panel to go to the Stream Steps screen.

Tap the plus icon to add a step to the current stream instance.

On the Add Step screen, enter the necessary details.

Tap **Save** to add the new step to the bottom of the steps list. You can reorder the steps as required.

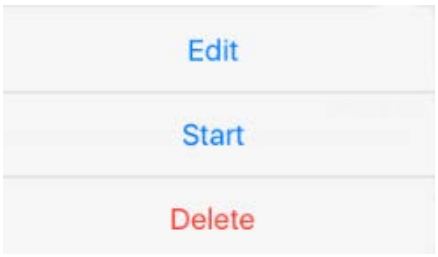
Tap the plus icon to add another steps, or tap **Done** to go back to the Edit Stream screen.

Start a Stream Step

To start a stream step, you must be owner of the stream or an internal participant of the stream step.

On the left panel of the streams section, tap a stream with a **Running** status to select it.

On the right panel on the Stream Details screen, tap the right arrow icon of the **Not Started** step to go to the Step Details screen. Tap the action icon to display this dialog:



Tap **Start** to start the step. The status of the stream step changes to **Running**.

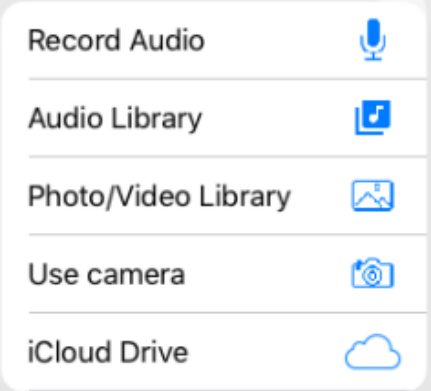
Add Attachments

To add attachments to a stream step, you must be the owner of the stream or an internal participant of the stream step.

On the left panel of the streams section, tap a stream with a **Running** status to select it.

You can add attachments to a stream step in **Running** status.

On the right panel on the Stream Details screen, tap the right arrow icon of the step to go to the Step Details screen. Tap the add attachments icon to prompt the attachment options dialog:



Add Comments

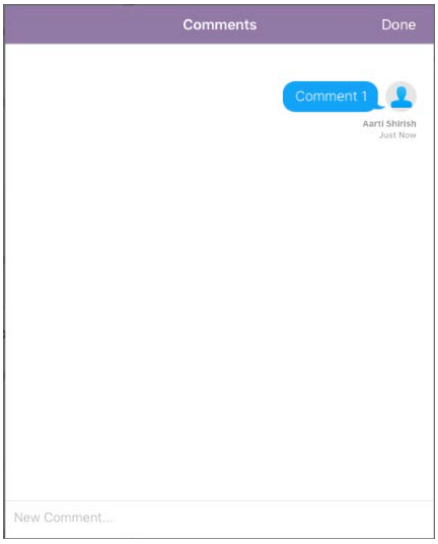
To add comments to a stream step, you must be the owner of the stream or an internal participant of the stream step, if the stream is a private stream.

If the stream is a public stream, any Infor Ming.le user who is not a participant of the stream can also add comments to a stream step.

On the left panel of the streams section, tap a stream with a **Running**, **Completed**, or **Canceled** status to select it.

You can add comments to a stream step that has a **Not Started**, **Running**, or **Completed** status.

On the right panel on the Stream Details screen, tap the right arrow icon of the step to go to Step Details screen. Tap the comments icon to display the Comments screen:



In the **New Comment** box, enter your comment. You can add attachments to the comment. Tap **Send** to add your comment to the current stream step. Tap **Done** to dismiss the Comments screen and go back to the Step Details screen.

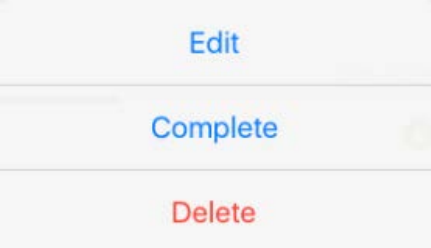
Edit a Stream Step

To edit a stream step, you must be the owner of the stream.

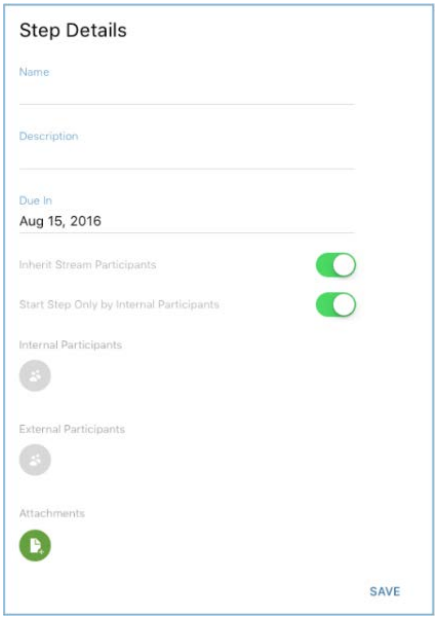
On the left panel of the streams section, tap a stream with a **Not Started** or **Running** status to select it.

You can edit a stream step only with a **Not Started** or **Running** status.

On the right panel on the Stream Details screen, tap the right arrow icon of the step to go to the Step Details screen. Tap the action icon to display this dialog:



Tap **Edit** to go to the Edit Step screen:



On the Edit Step screen, you can edit this information only:

- Name
- Description
- Due In
- Select/Clear **Inherit Stream Participants** check box
- Select/Clear **Start Step Only by Internal Participants** check box
- Add/Delete Internal and External Participants
- Add/Delete Attachments

You cannot edit the widget details on the mobile application if the step has any widgets.

Tap **Save** to save the changes to the step.

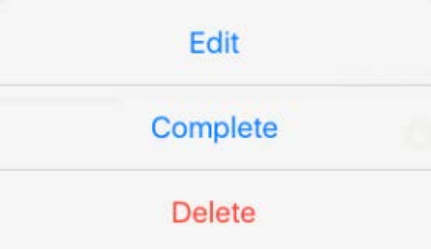
Complete a Stream Step

To start a stream step, you must be the owner of the stream or an internal participant of the stream step.

On the left panel of the streams section, tap a stream with a **Running** status to select it.

You can complete a stream step only with a **Running** status.

On the right panel on the Stream Details screen, tap the right arrow icon of the step to go to the Step Details screen. Tap the action icon to display this dialog:



Tap **Complete** to complete the step. The status of the stream step changes to **Completed**.

Resume a Stream Step

To resume a stream step, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Running** status to select it.

You can resume a stream step only with a **Completed** status.

On the right panel on the Stream Details screen, tap the right arrow icon of the step to go to the Step Details screen. Tap the actions icon to display this dialog:

Tap **Resume** to resume the step. The status of the stream step changes to **Running**.

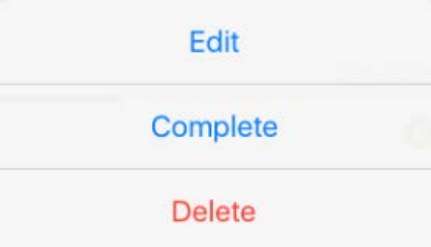
Delete a Stream Step

To delete a stream step, you must be the owner of the stream.

On the left panel of the streams section, tap a stream with a **Running** status to select it.

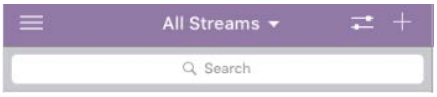
You can delete a stream step only with a **Not Started** or **Running** status.

On the right panel on the Stream Details screen, tap the right arrow icon of the step to go to the Step Details screen. Tap the action icon to display this dialog:



Tap **Delete** to delete the step. The selected step is removed from the steps list.

Search



Pull down on the streams screen to display the Search toolbar.

As you enter text, matching results are displayed.

Tap **X** to clear the search input area. Tap **Cancel** to close the Search toolbar.

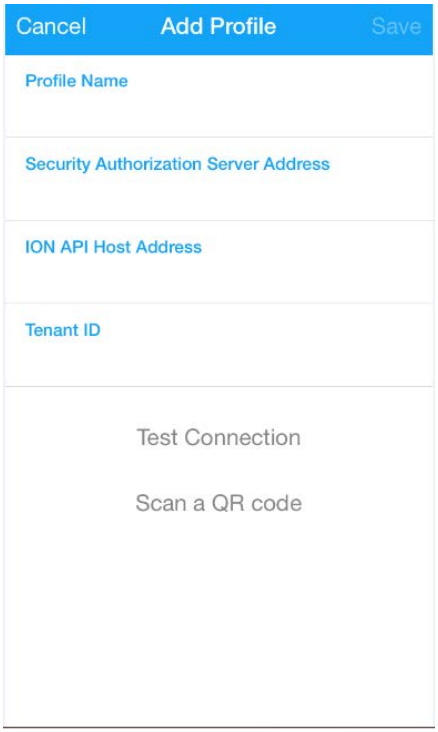
Manage profiles

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

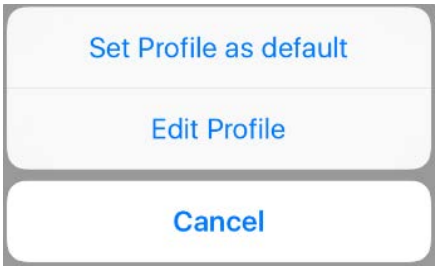
To add a new profile to the Profiles screen, tap the plus icon to display the Add Profile dialog and tap **Scan a QR code** to scan a QR code:



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

Deleting the profile

Swipe left to display the delete option and tap **Delete** to delete a profile from the Profiles screen.