

Huddle iPad App Guide

Using the iPad app as an alternative to the Huddle web application

This guide provides information on the functionality that is available on the Huddle iPad app and how to use it.

Many people simply use the Huddle iPad app when they are on the go to view files, but an increasing number of users now prefer to use their iPad as their primary way of working. This guide will also help those Huddle users understand what capabilities exist on their iPad app and what actions can only be done by logging onto Huddle via a web browser.

Remember that there are two versions of the Huddle iOS app, one for commercial clients and another for the US Public Sector. When searching for the US Gov version of the application in the app store, search “Huddle US Gov” (it’s the grey icon) to locate the gov. version.



Icon for commercial iOS app *Icon for US Gov Version of iOS App*

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Key

These symbols show when there is a key difference between using a Huddle feature in a web browser and using the Huddle iPad app.



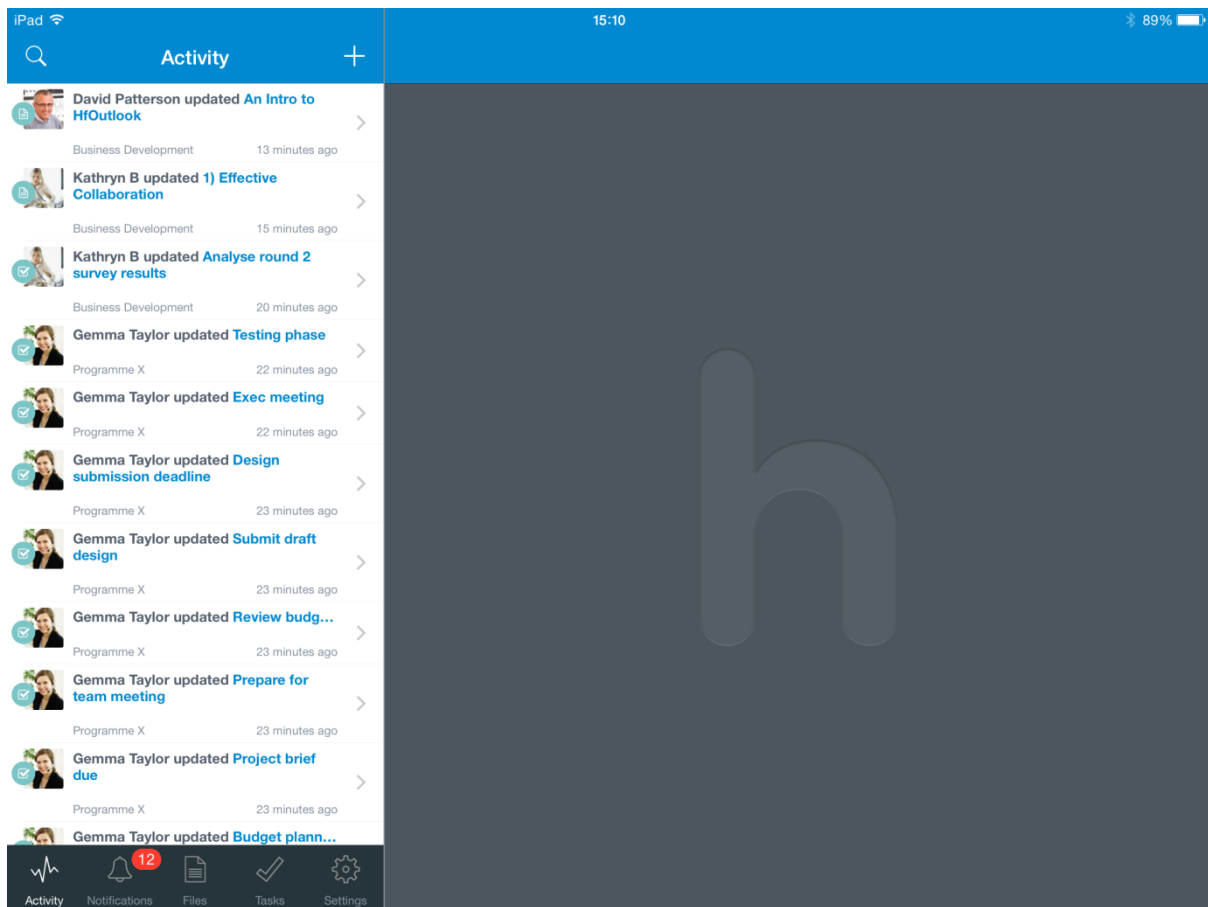
This symbol will highlight when some Huddle actions can only be done on the web application and not on the iPad app.



This symbol will highlight when some Huddle actions can only be done on the Huddle iPad app and when there are features that are presented differently from the Huddle web application.

Activity

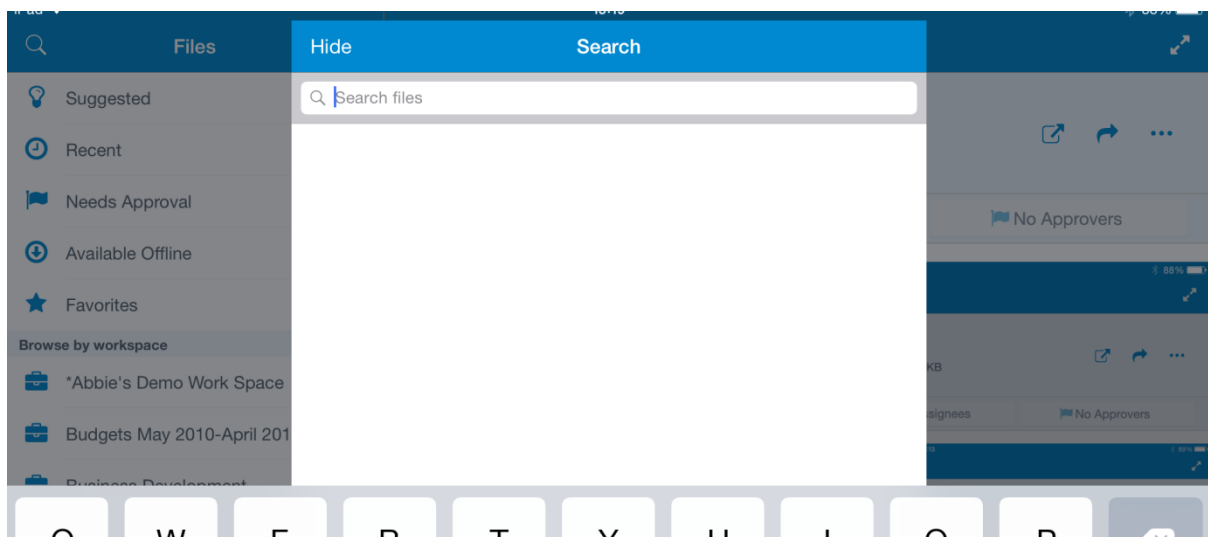
The Activity feed on your iPad app will display the same information that appears on the Activity feed on your Dashboard page in the browser. This is a list of actions that have happened across all the workspaces that you are a member of.



By clicking on each action you will see the item open in the main panel.

Search

Just as when using Huddle in the web application you can search across your workspaces for a file.



Notifications

Notifications on your iPad app will show anything that you have been notified of across your Huddle workspaces. This correlates with notifications that you receive over email and also in the “Notifications Center” of the browser/web app version of Huddle.

The notifications on your iPad app will show who has notified you, what of and when. By selecting a notification you will see the item open in the main panel.

The screenshot shows the Huddle iPad app interface. The top navigation bar is blue with a search icon, the word 'Notifications', and utility icons for messages, share, refresh, and more options. The left sidebar lists notifications with user avatars and titles, such as 'Taneli Potticary approved Launch Email Template' and 'Adam Azoff updated approval on Audit Committee Meeting Minutes Aug-21-2017'. The main panel displays a document titled 'Committee Meeting Minutes Jul-21-2018.docx' with a status bar indicating 'Awaiting approval' by Jul 31, 2018. The document content includes a table of attendees and several action items.

Invitees:	In Attendance:
Rick Steinberg (Audit Committee Chair)	Yes
Rachel Martinez	Yes
Sean R.	Yes
David Morton	Yes
Maria Bianchi	No
Adam A	No

1. Re: To confirm the minutes of the previous meeting:
The Minutes of the previous meetings held on April 19th 2017 were confirmed.

2. Re: To review internal control and internal audit system:
The Committee was briefed about the internal control and internal audit system presently being prevailed in the Company. The Internal Audit Report of the Internal Auditors was placed before the Board for discussion. The Board discussed the same.

3. Re: To consider and recommend to the Board of Directors, the Balance Sheet as at 31st March, and the Profit and Loss Account for the year ended on that date along with Notes on Accounts and Cash Flow Statement:
The Balance Sheet of the Company as at 31st March, 2017 and the Profit and Loss Account for the year ended on that date, duly audited, were placed before the Committee. The Committee noted that the Profit before Depreciation, Interest, Tax & Non-recurring item was \$XXXXXXX USD for the year under review as compared to Profit of \$XXXXXXX USD for the previous year.



Notifications are ‘marked as read’ as you click on a given notification. You receive a notification from Huddle for actions such as comments, approvals, shares, etc. that involve you or your team in a workspace.

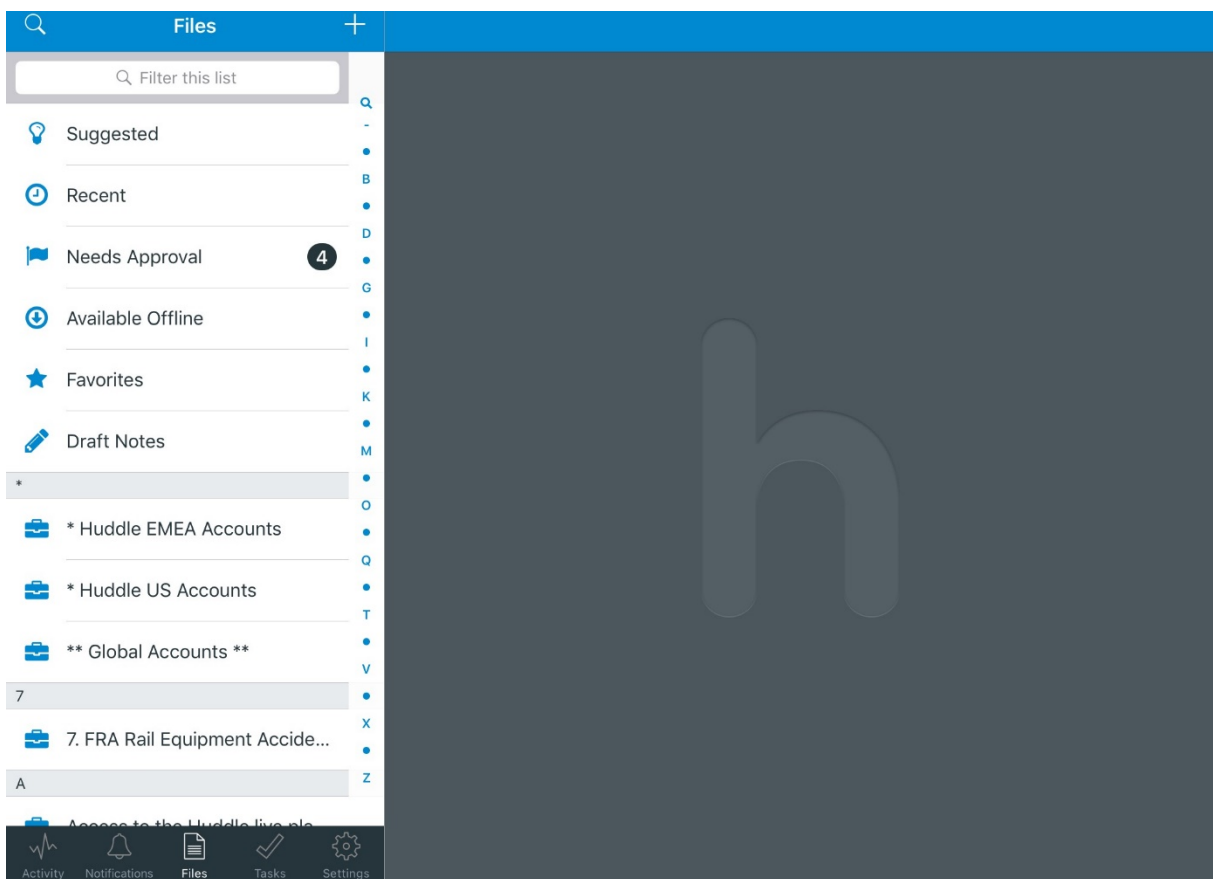


Unread notifications on the app are indicated by a darker grey coloration.

Files

The files area of your app will give the option to either browse by workspace and navigate through the folder structures or use the sections at the top of the list which will direct you straight to the files that you may find useful. These sections are:

- Suggested: Files that you have been notified about or that you may have previously interacted with
- Recent: Files that you have viewed, edited, or commented on recently
- Needs Approval: Files that have been assigned for you to approve
- Bookmarks: Files that you have selected to be bookmarked while on the web. Bookmarked files are available offline
- Draft Notes: Simple text editor for making personal notes, you can save to workspaces to share.



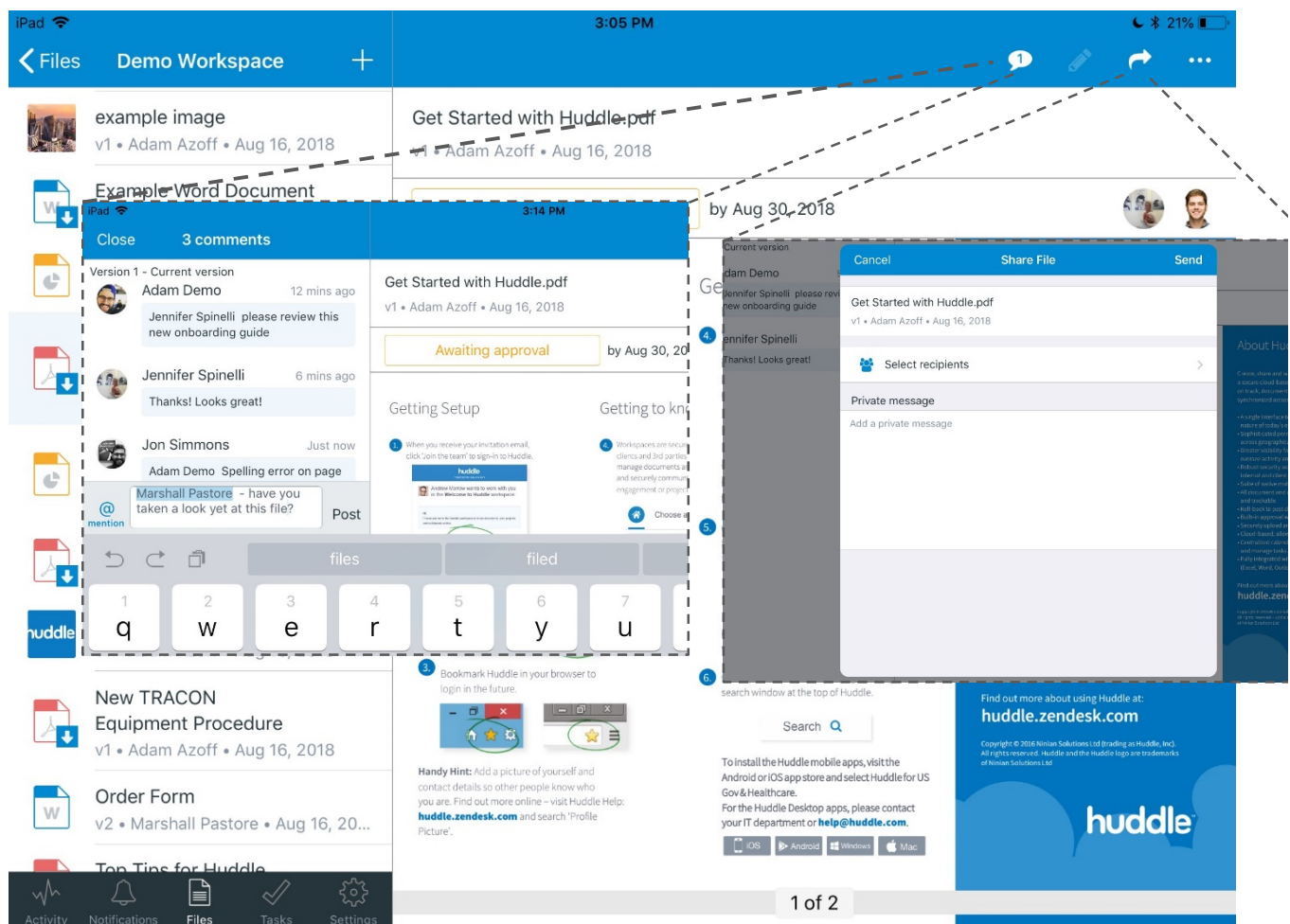
Some of the sections at the top of the files tab are unique to the iPad app and are not available on the web application. For these sections to maintain information the app needs to be signed in. When you sign into the Huddle app and are connected to the internet, these sections will update automatically.

Viewing a File

From the panel on the left you can navigate to a file you wish to view. You will see some meta data, for example the version number, at the top and the file preview just as you can when using the Huddle web application.

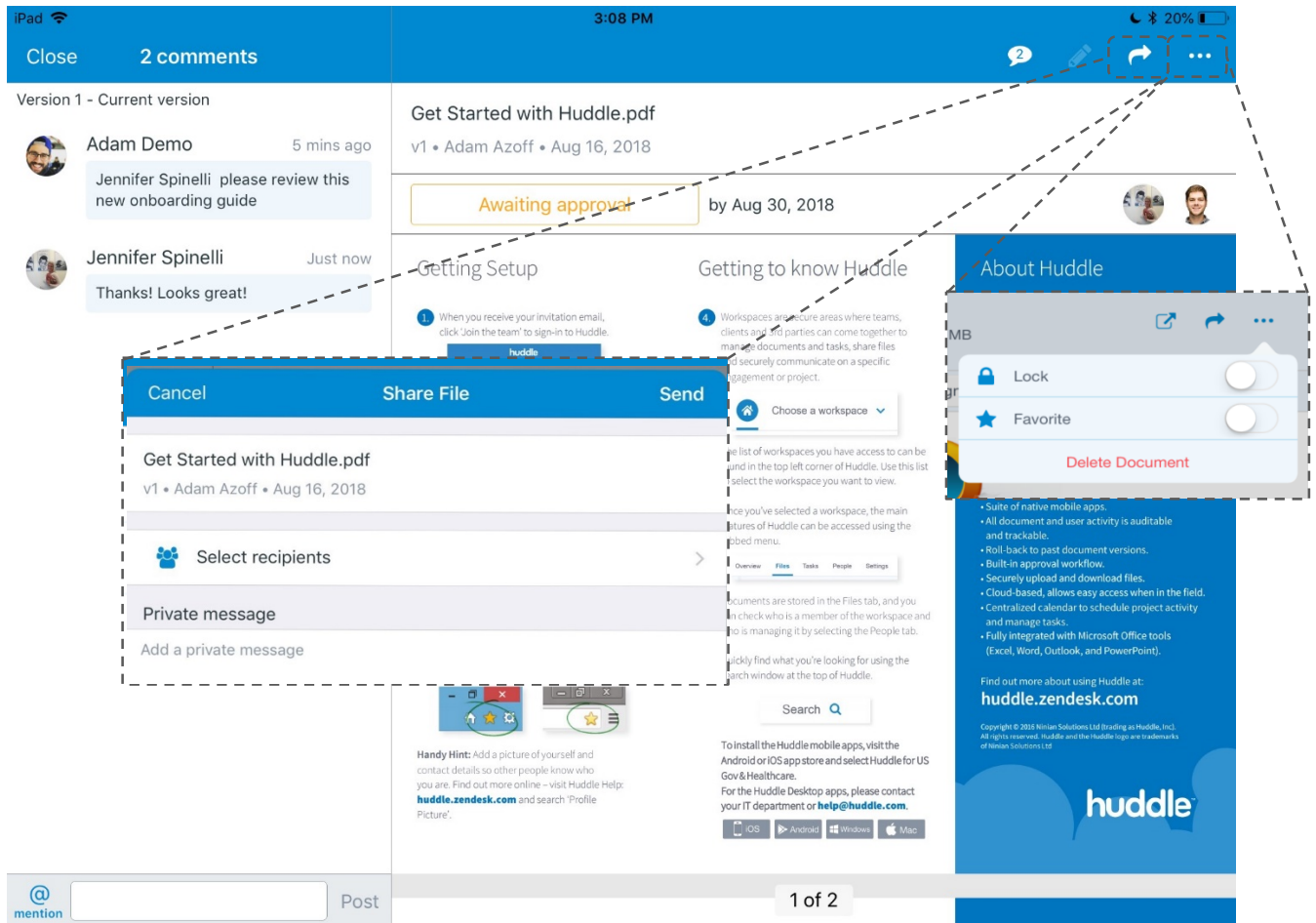
The other file actions that you can achieve with the iPad app include:

- Preview the file
- View comments
- Add a comment and @mention a workspace member or team in the comment
- View who has been assigned to approve the file, and whether they have done it or not
- Approve the file (if you are assigned to do so)
- View the file in full screen
- Open the file in another application (for viewing or editing)
- Edit/annotate a PDF file with in the app (if you have editor rights in the given workspace)
- Share the file with workspace members and add a message to the notification
- Lock the document
- Get a shareable link to the file
- Add a file to your list of bookmarks
- Delete the file (if you have permission to do so)





Note that in order to preview the file the Huddle app uses the native Apple file previewer. The preview in the Huddle web application is Huddle's own previewer.



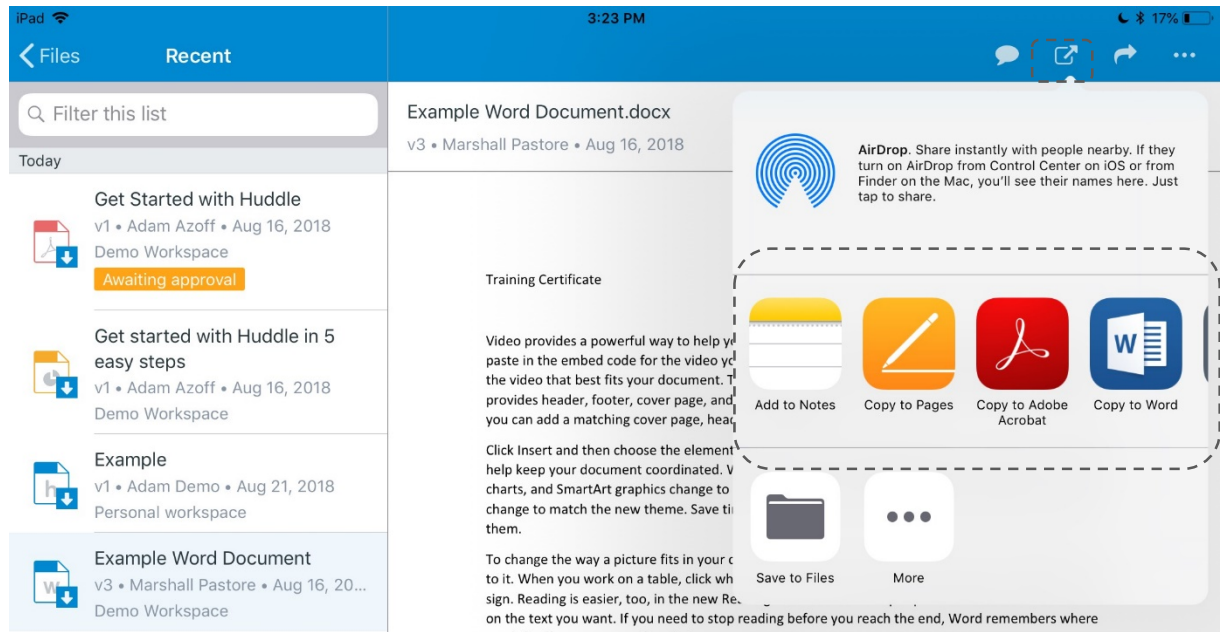
It is necessary to be using the Huddle web application in order to do the following file actions:

- Move or copy a file
- Access the activity or version history of a file
- Upload files in bulk
- Assign people to approve a file
- Edit access rights to a folder

Editing a File

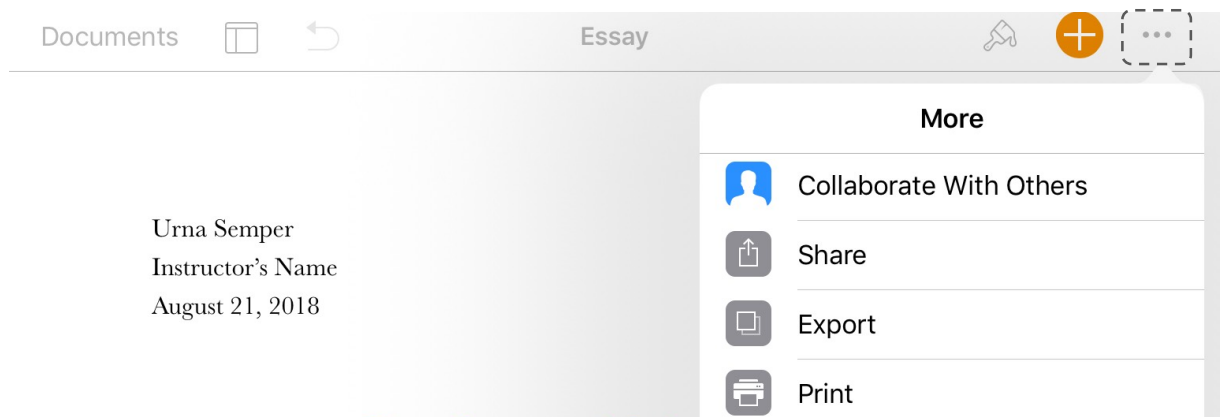
It is possible to edit a file on the iPad by opening a file from Huddle in another application. Note that applications on your iPad used for editing content may function slightly differently from one another.

To edit a file select it on the iPad app and then select to open it in another application:

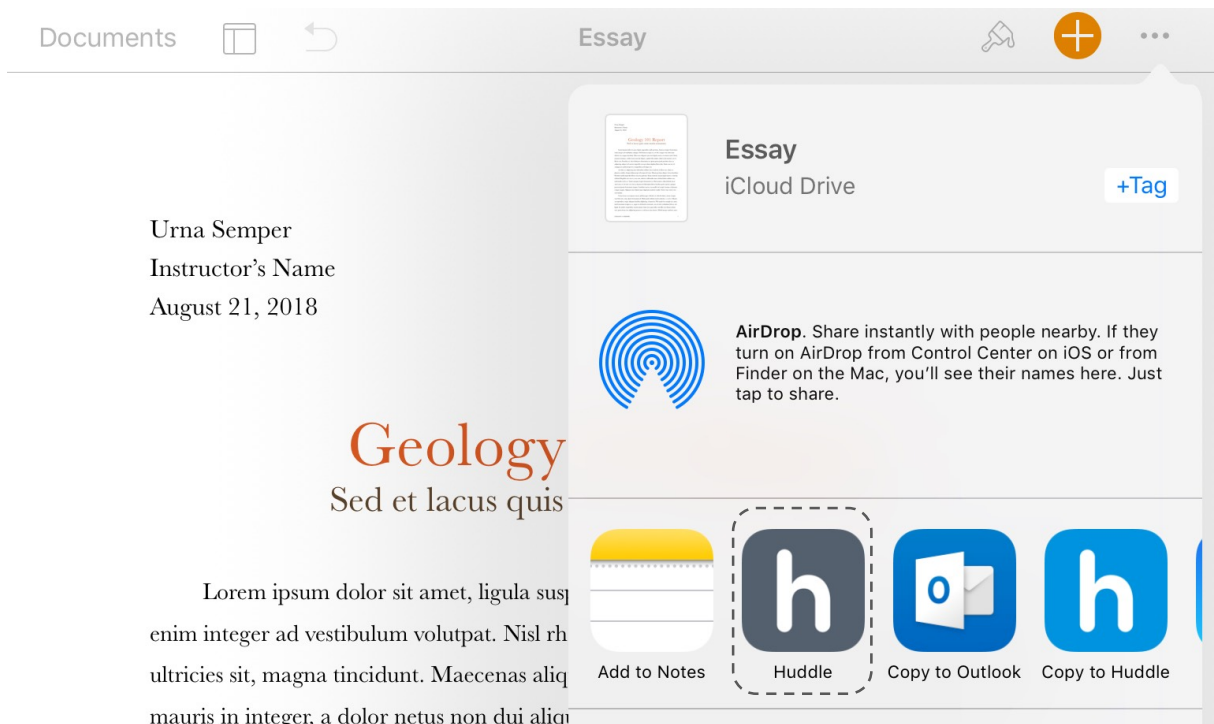


Based on what applications you have downloaded to your iPad, you will see different options in this panel. In this case the file is going to be opened with the Pages app. The file will open in the selected application where you can edit or annotate it (depending on what that application allows you to do!).

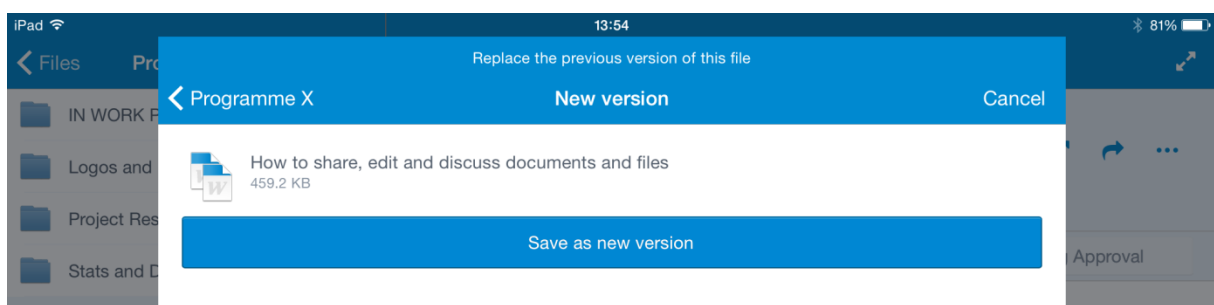
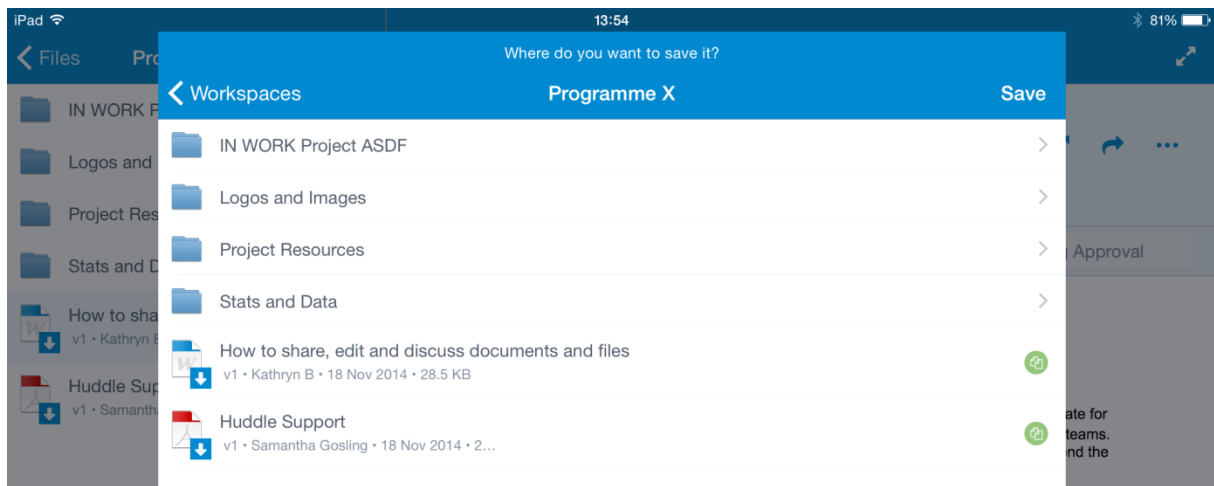
When you are ready to save your file back to Huddle as a new version then use the open in button (it may look different in each application) and select the 'Share' or 'Open in Another App' button.



Click on the Huddle icon from your list of available apps:



The Huddle app will ask you which workspace you wish to save the file back to and where in the folder structure. Locate the file, select it, and an option will appear to **save your new version** back into Huddle. If you save the file back into another workspace or folder then you will be uploading a separate file altogether, but the second copy will have your new changes.



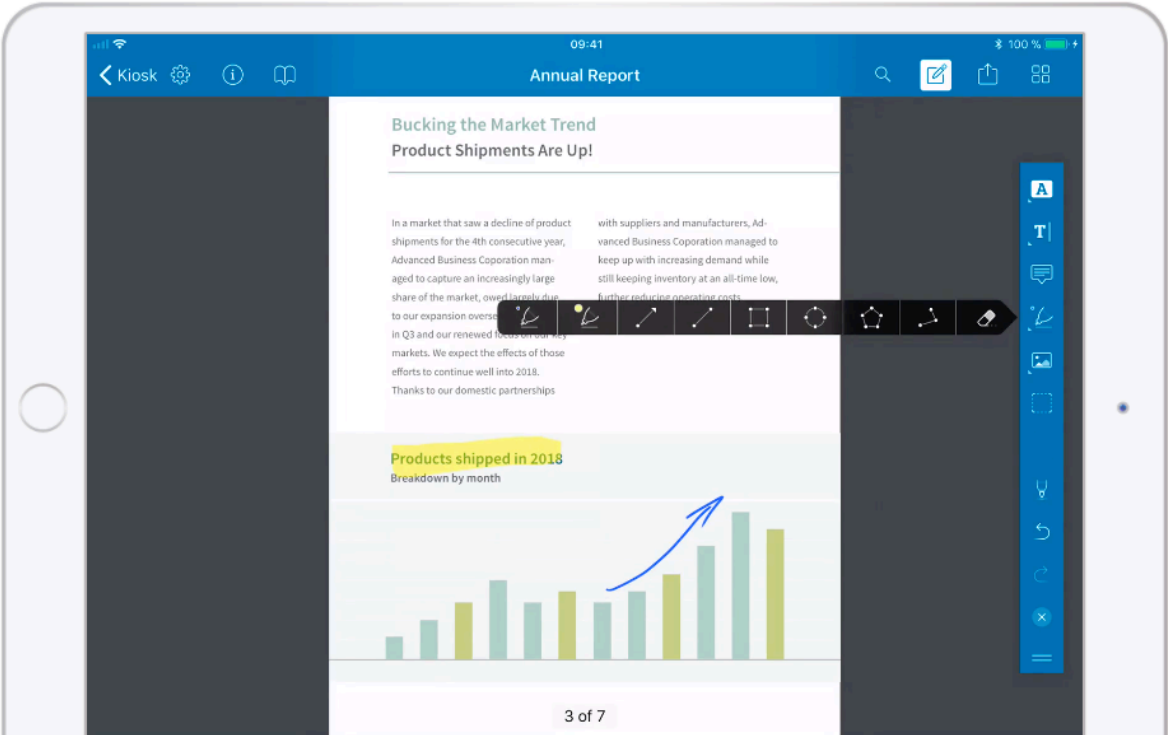
The file will be updated in Huddle and will show that you have updated a new version.



In general, when viewing and editing files on the iPad app you may find that the formatting of your files is not maintained and so you may find it easier to edit files on a computer. The quality of the preview will vary depending on what iPad applications you use to view and edit your files. If you are editing a Word document, then you will find that Pages works fairly well but it cannot display some fonts and formatting. The MS Office apps for iPad will not do this but will limit your ability to save the file back to Huddle (or any other application).

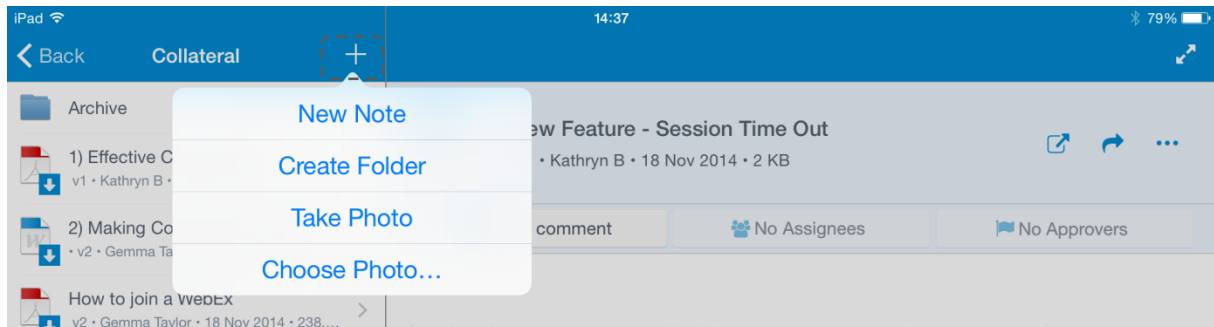


While viewing a PDF Document in the iOS app (and assuming you have the appropriate permission level to edit that document), you will notice that you can click on the pencil icon to edit your file without ever leaving the app. You have options to insert comment boxes, free hand text, highlight, and more. The annotations are saved back to Huddle as a new version of the file.



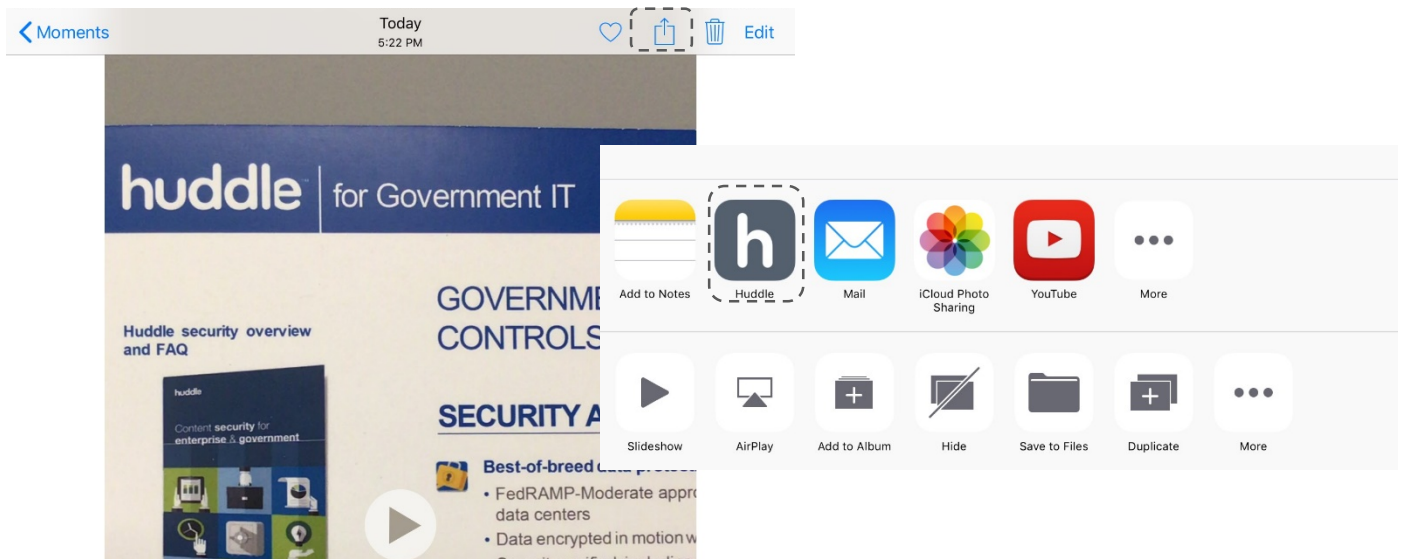
Creating content

There are a few items that you can create in Huddle while using the iPad app. These include folders and notes. You can also take a photo or upload a photo using the Choose Photo option.



If you would like to upload a video:

1. Go first to the video on your iPad
2. Click the share icon
3. Select Huddle
4. Specify the workspace / folder you would like the file added to



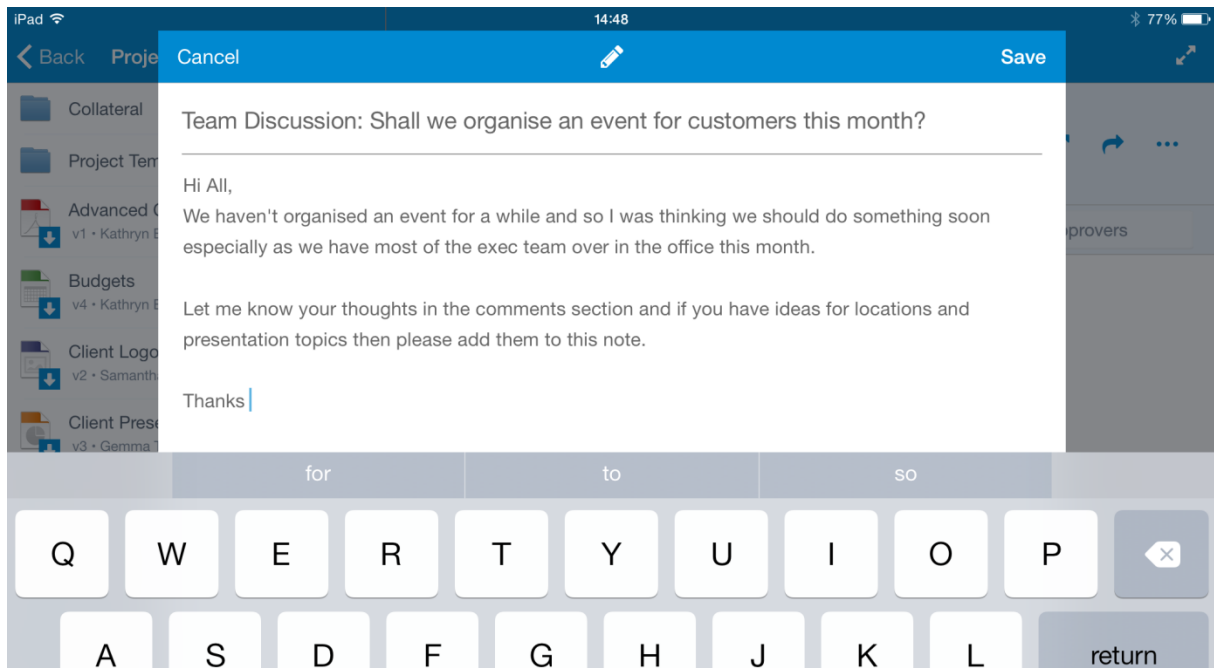
Use the Huddle web application to create new workspaces and more easily upload files in bulk.

Creating a New Note

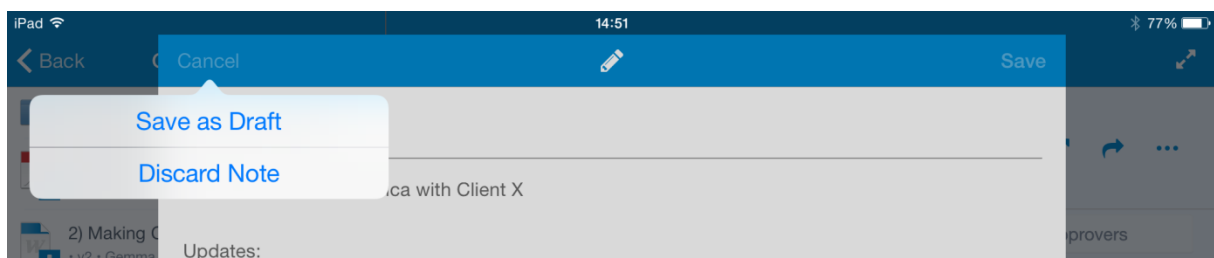
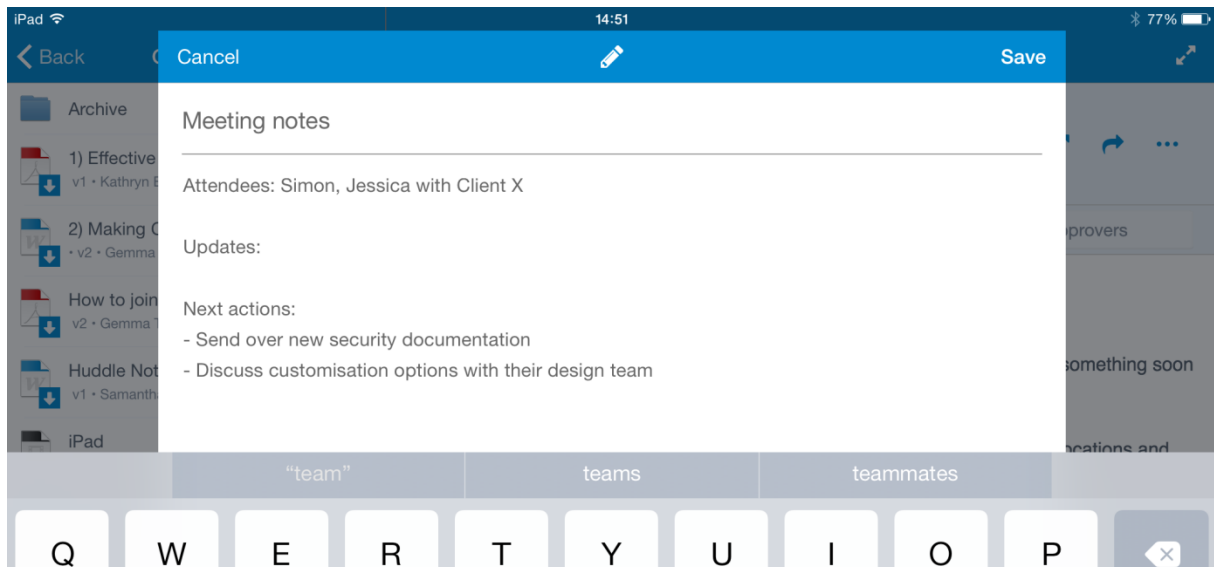
Notes are a great way to send messages to workspace members and share information that does not need to be formatted as a document. You can start a discussion in your workspace by creating a note and asking people to comment underneath (just as you can with a file).

Simply select the '+' button and then 'New Note'. Make sure your note has a title and add the body of the note before saving. Your note will be saved in the workspace and folder that you were in when

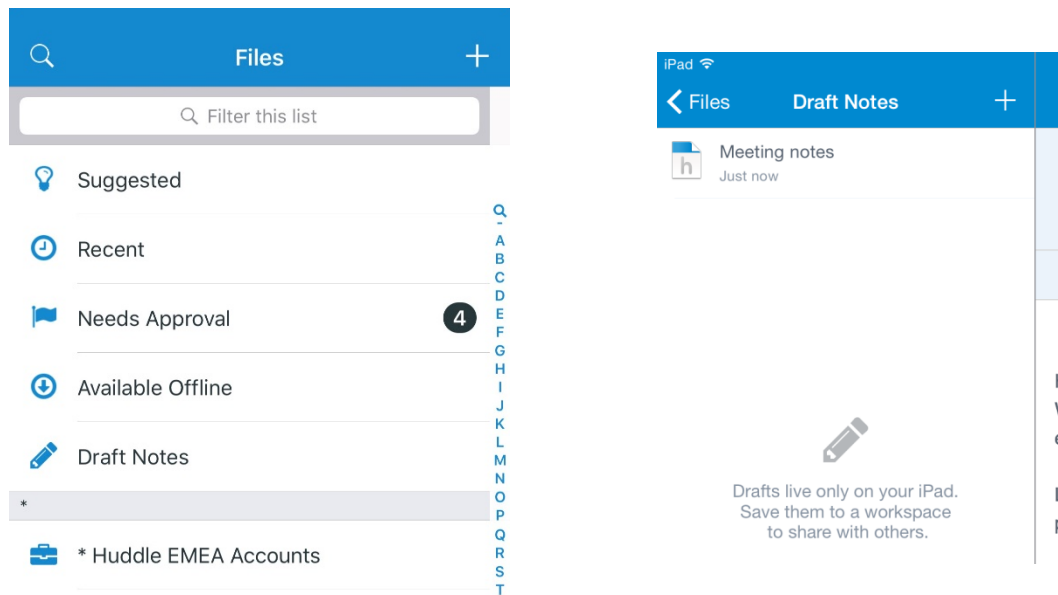
you opted to add a new note. Once saved you can comment and share just as you can for another file.



You may wish to use a Huddle note on your iPad and keep it as a draft to save into a workspace later. Simply start your note as above but instead of saving it, select 'Cancel' and then 'Save as Draft'.



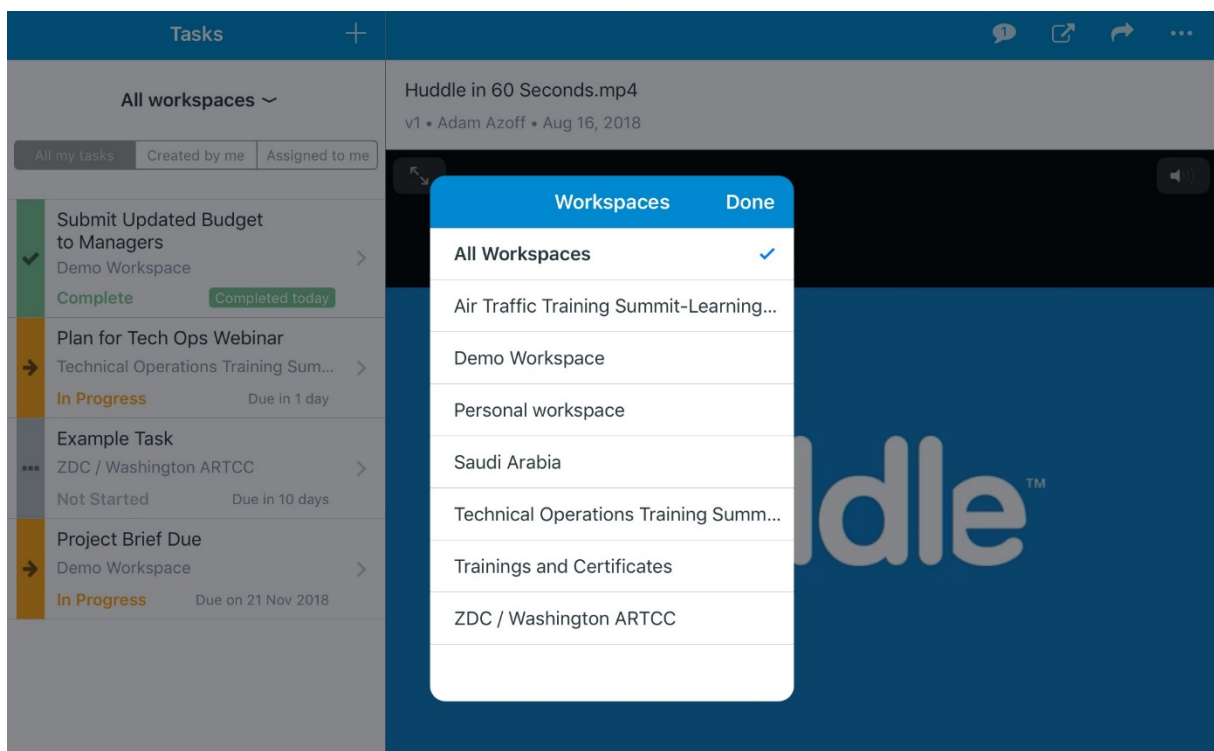
Your note will be saved in a new section called 'Draft Notes' on your Files page.



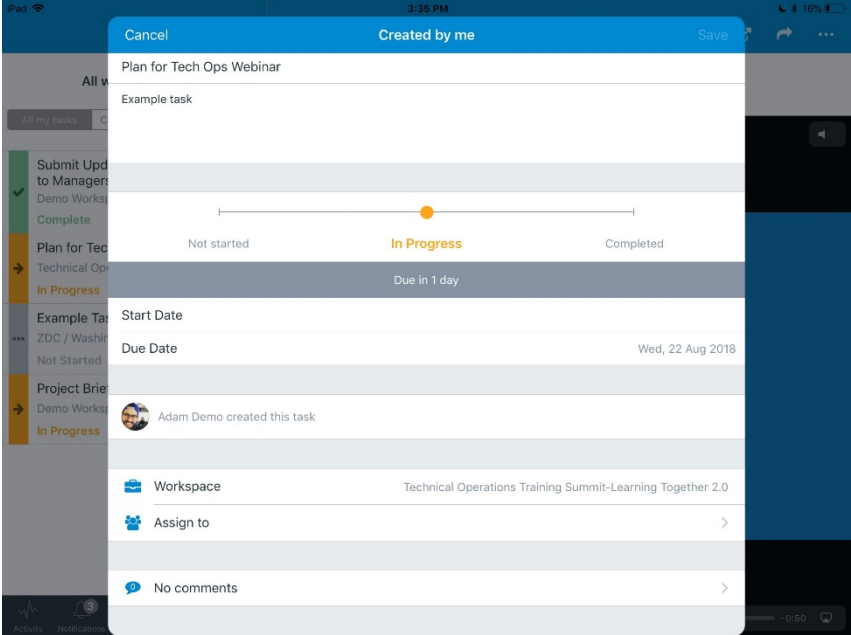
If you sign out of the Huddle app then your draft notes will not be saved. If you stay signed in then you can return to your draft notes and continue to edit them. To delete a draft, swipe to the left on the note in the drafts section and an option to delete it will appear.

Tasks

When travelling you may need to quickly add, update or view tasks in Huddle. The Tasks section will show you all tasks you've been assigned or that you have created from across your workspaces, but you can change the filtering options by clicking the down arrow to alter the view.

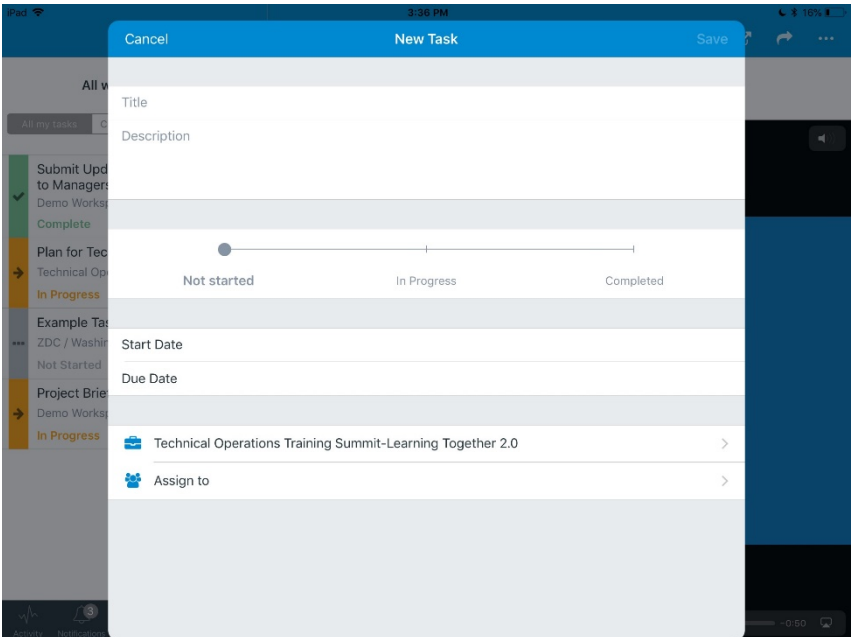


If you have permission to edit tasks (i.e. you are the workspace manager or the creator of the task) then you can add or change the assignees and edit the start and due dates. If the task is assigned to you it will be possible to change the status of the task from 'not started' to 'in progress' to 'complete'. This status is indicated in the grey, yellow, or green icons. If you are involved in the tasks it is also possible to add a comment.



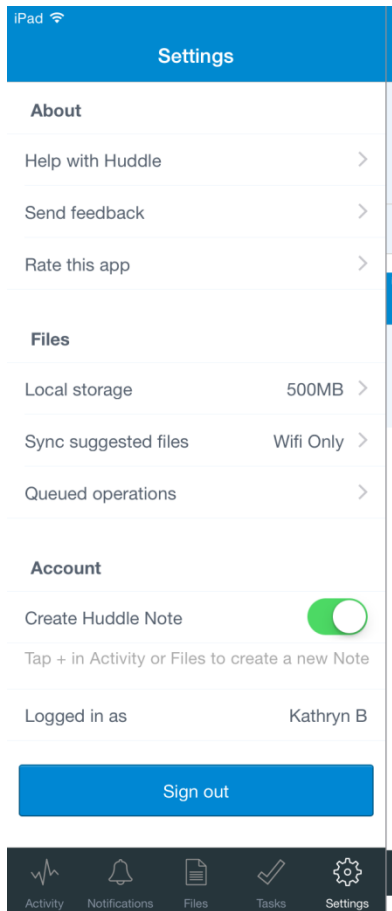
To add a task description (to an existing task), you will need to use the web application. Custom task fields are also not compatible with the iPad app – to view, edit or filter by these it is necessary to use the Huddle web application in a browser.

To create a task select the '+' button in the Tasks section and add your task name, start and due dates, which workspace you would like the task to show in, and the assignees.



Settings

The settings area in Huddle differs significantly from the Settings tab in the workspace. It allows you to adjust the local storage and sync settings.



Use the Huddle web application to do any of the following:

- Change a workspace title and description
- Adjust user privileges (e.g. who can create folders in a workspace)
- Invite people to a workspace
- Create teams or edit the titles of teams
- Assign users to teams
- Make a user a workspace manager
- Remove users from a workspace or the account
- Adjust the feature tabs that show in a workspace (not relevant for the iPad app)
- Create or edit custom task fields
- Access the Account Settings or Company pages (if you are a Huddle administrator)