

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).



Icon for US Gov Version of iOS App

Icon for commercial 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.



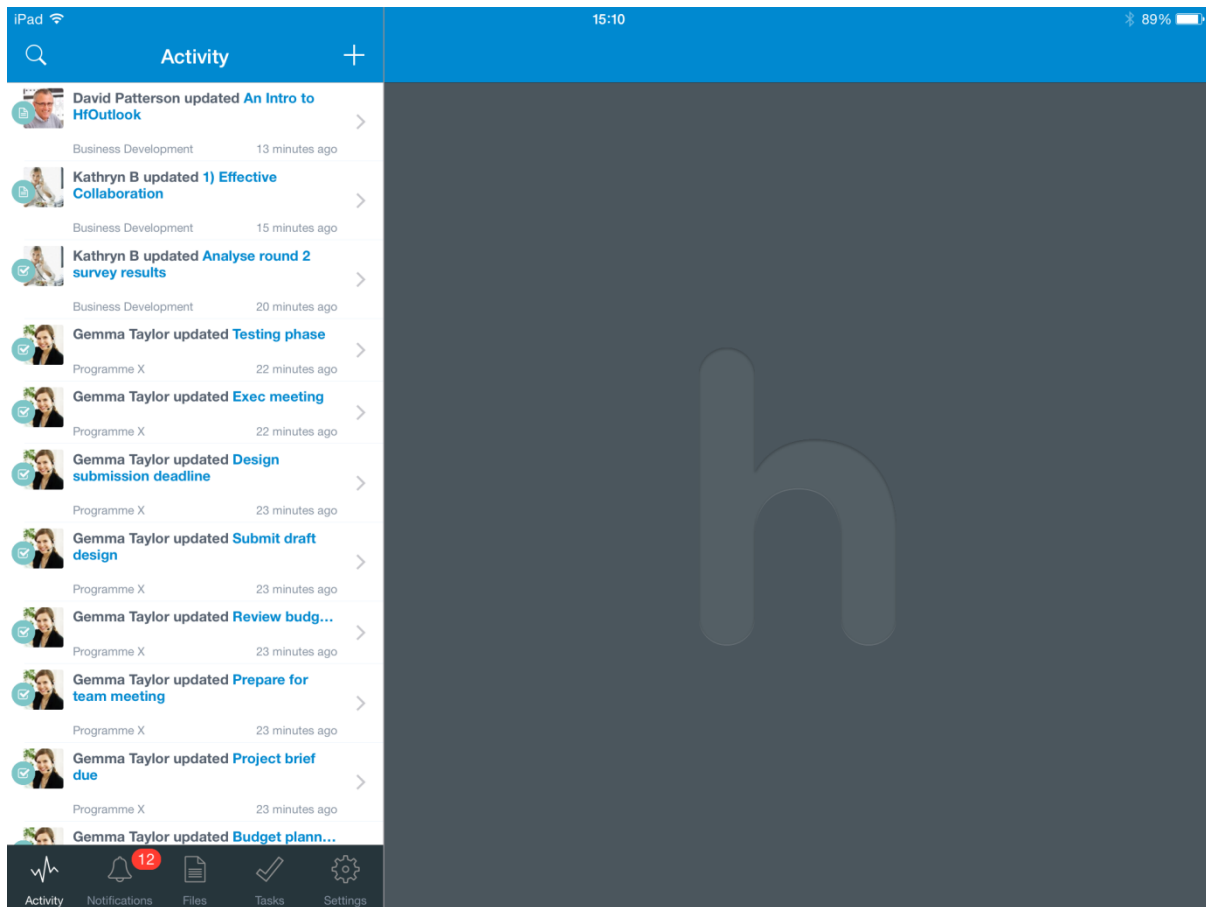
This symbol will highlight when some Huddle actions can only be done on the web application and not on the iPad app.



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

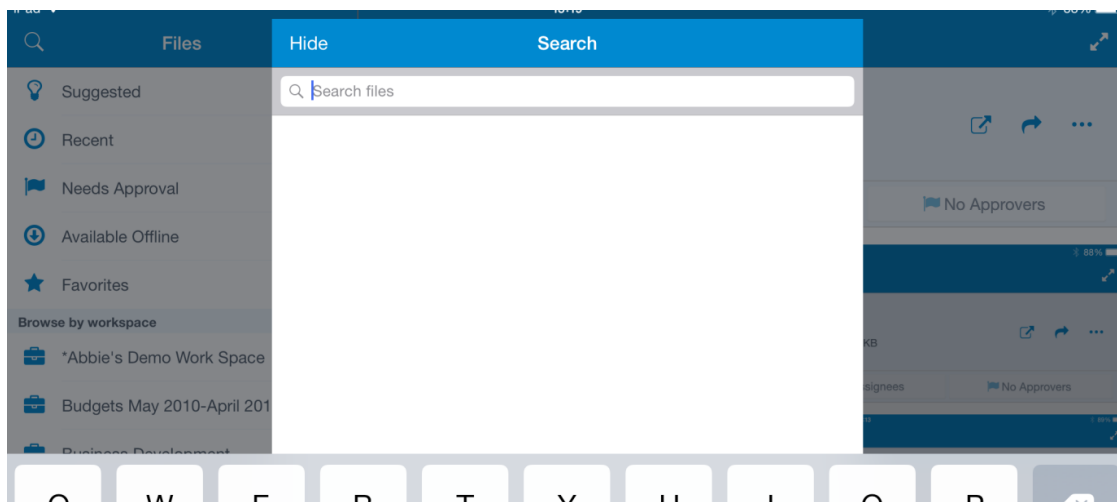
The Activity feed on your iPad app will display the same information that appears on the Activity feed on your Dashboard page in the browser. This is a list of actions that have happened across all the workspaces that you are a member of.



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

Search

Just as when using Huddle in the web application you can search across your workspaces for a file. Huddle's search will include the contents of the documents as well.



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's Notifications screen. The left sidebar contains a list of notifications:

- Taneli Potticary approved Launch Email Template (McD Huddle Demo, Jul 19, 2018)
- Taneli Potticary approved USAID_Product_Updates (US Public Sector, Jul 19, 2018)
- Adam Azoff updated approval on Audit Committee Meeting Minutes Aug-21-2017 (DEMO: AUDIT - Current Audit F...)
- Taneli Potticary commented on Audit Committee Meeting Minutes Aug-21-2017 ("Thanks for sharing this, Adam Azoff" (DEMO: AUDIT - Current Audit F...))
- Taneli Potticary approved Audit Committee Meeting Minutes Aug-21-2017 (DEMO: AUDIT - Current Audit F...)
- Jennifer Spinelli commented on FAA-Safety_Tech_Training_Webina r

The main panel displays a document titled "Committee Meeting Minutes Jul-21-2018.docx" (v38 • Adam Azoff • Jul 25, 2018). A yellow banner indicates "Awaiting approval" by Jul 31, 2018. The document content includes the Logistics Corp logo, a date stamp "25 July 2018", and a table:

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

Below the table, there are instructions and action items:

- I just added this text to a document Using the Office Online integration on an iPad (using the safari browser).
- And this with chrome browser, also on an ipad
- 1. Re: To confirm the minutes of the previous meeting: [Commented [551]: Test Comment]
- 2. Re: To review internal control and internal audit system:
- 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 bottom of the screen shows a navigation bar with icons for Activity, Notifications, Files, Tasks, and Settings.



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.



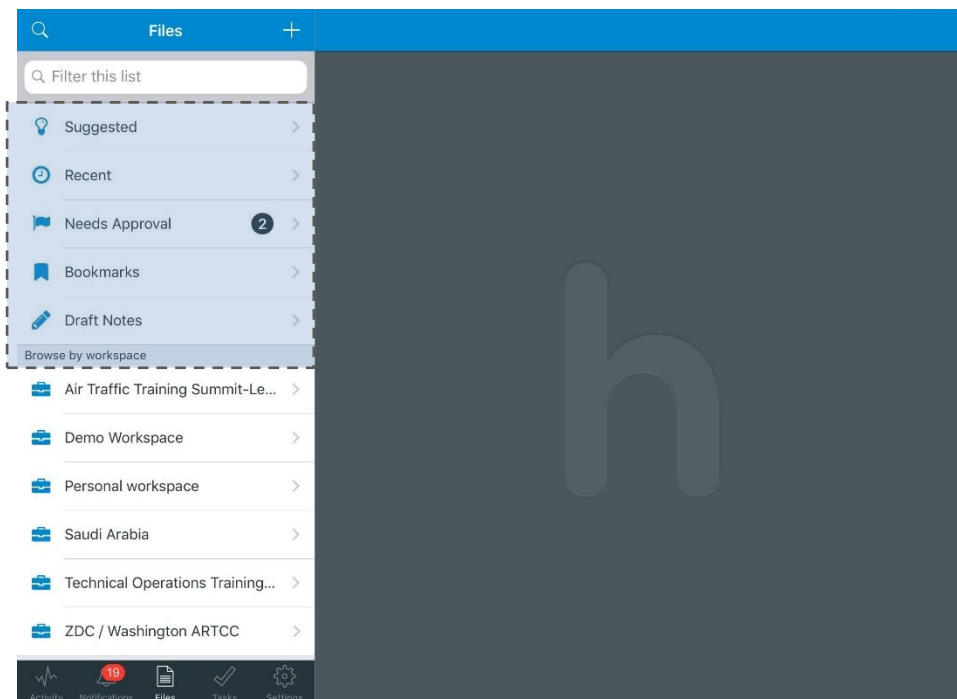
Unread notifications on the app are indicated by a darker grey coloration.

Files

The files area of your app will give the option to either browse to a given file by workspace and navigate through the folder structures, or by using the sections at the top of the list (e.g. Recent files) as an alternative way of getting to the file you are interested in.

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. Bookmarked files are available offline
- Draft Notes: Simple text editor for making personal notes, you can save to workspaces to share.



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.

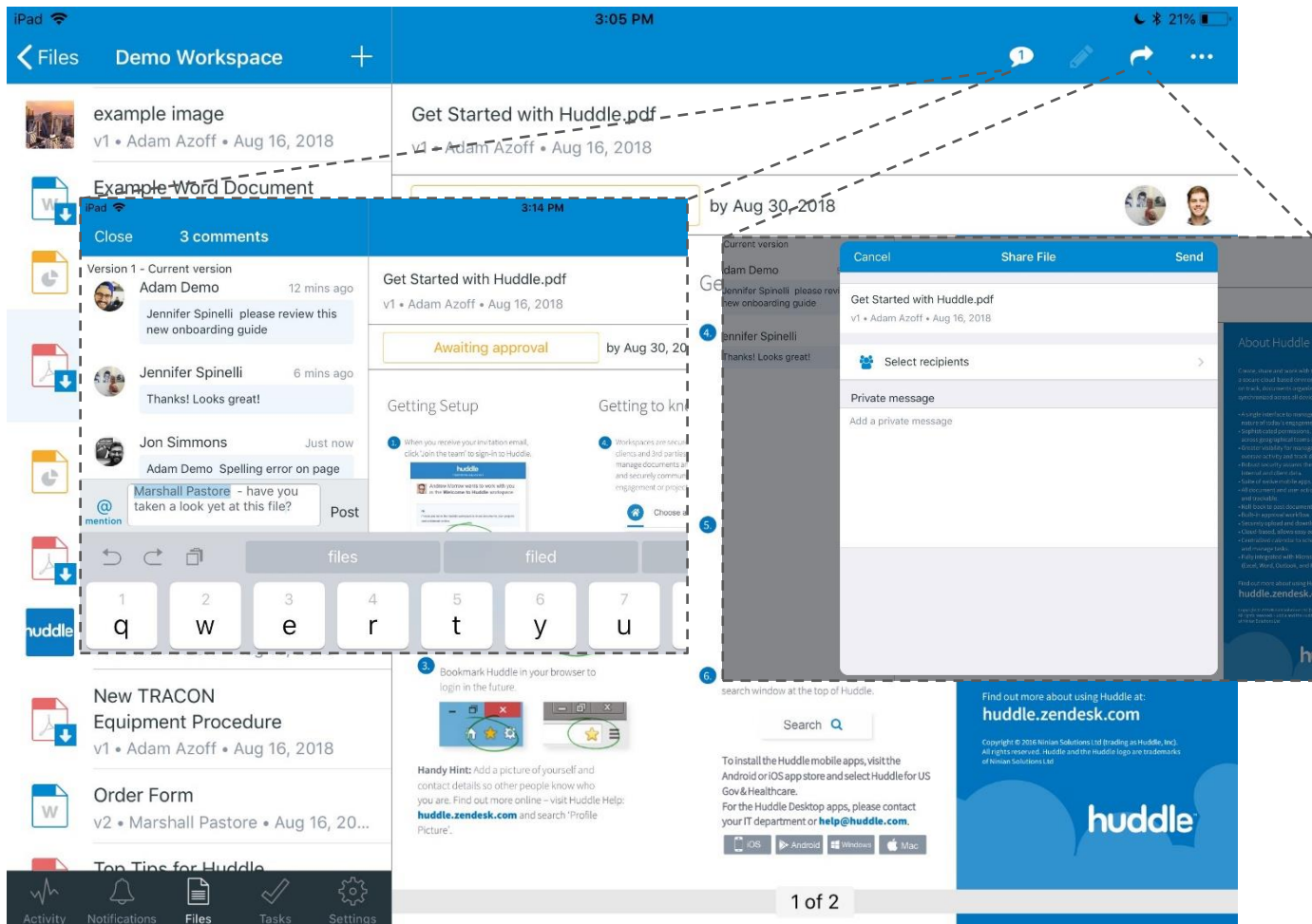
Viewing a File



From the panel on the left you can navigate to a file you wish to view. You will see some metadata, 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:

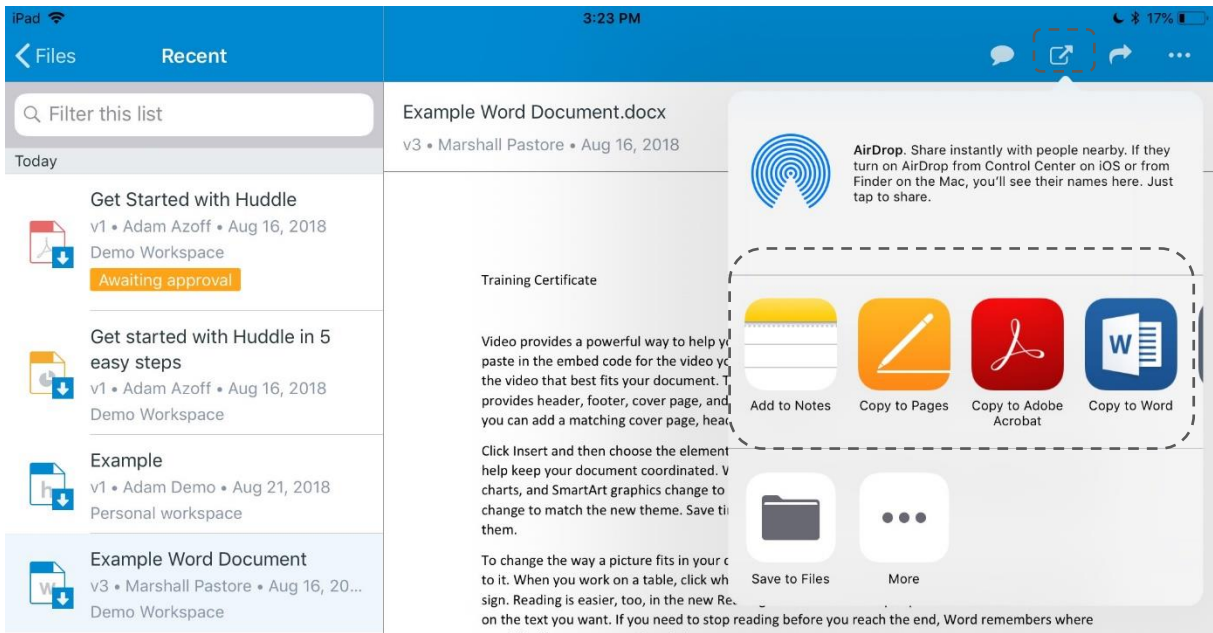
- Move or copy a file
- Access the activity trail or version history of a file
- Upload files in bulk
- Assign people to approve a file
- Edit access rights to a folder

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.

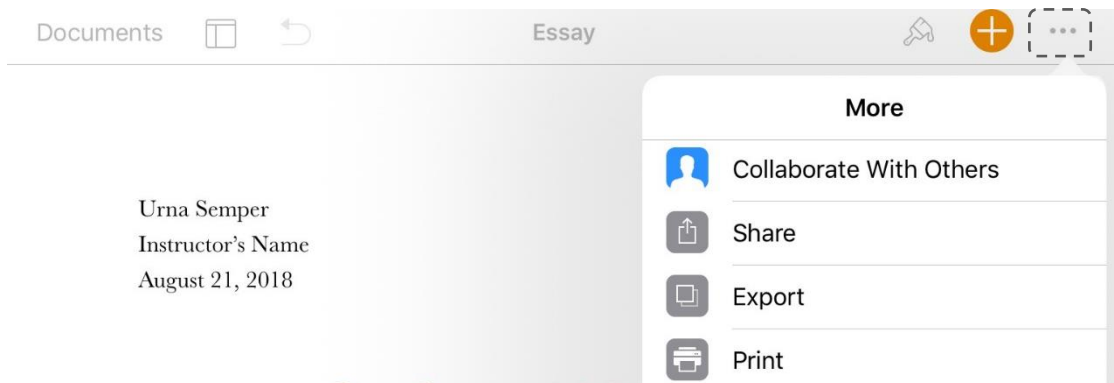
Your ability to edit or upload files in a workspace may be limited by a manager of the workspace. To better understand setting permission levels within your workspace, please review the following article: [How to Manager Folder Access in Huddle](#)

To edit a file, select it within the app and then open it in another application:

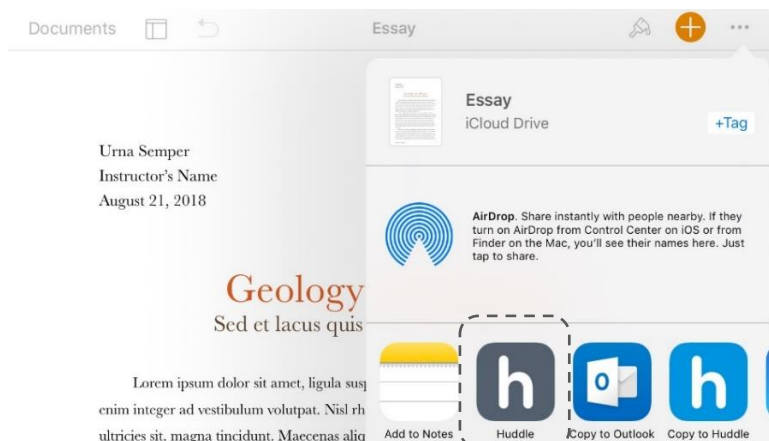


Based on what applications you have downloaded to your iPad, you will see different options in this panel. In this case the file is going to be opened with the *Pages* app (a word processor designed for the iPad). The file will open in the selected application where you can edit or annotate it (depending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

When you are ready to save your file back to Huddle as a new version use the 'Share', 'Export', or 'Open in Another App' button. The available options will vary depending on the editing application. In *Pages*, the export option will allow you to save the file back to Huddle as a Word document file type.

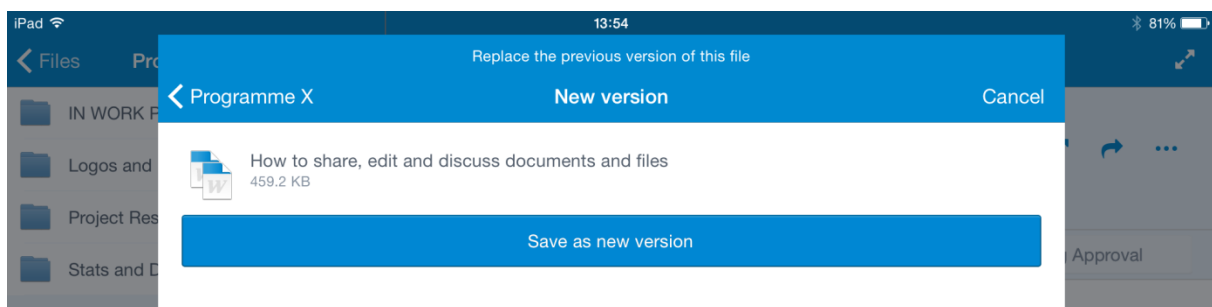
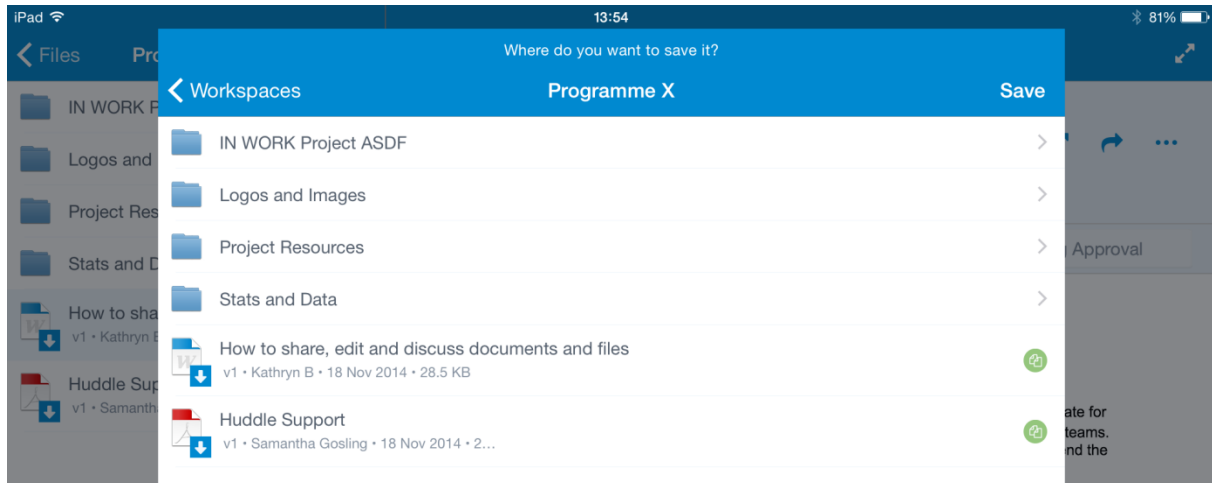


Then click on the Huddle icon from your list of available apps:



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.

Please note, **before** opening the file in a separate application for editing, **it is recommended to first make note of what workspace and folder the file resides within**. This will make it easier later when navigating to the file to save it back as a new version.



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



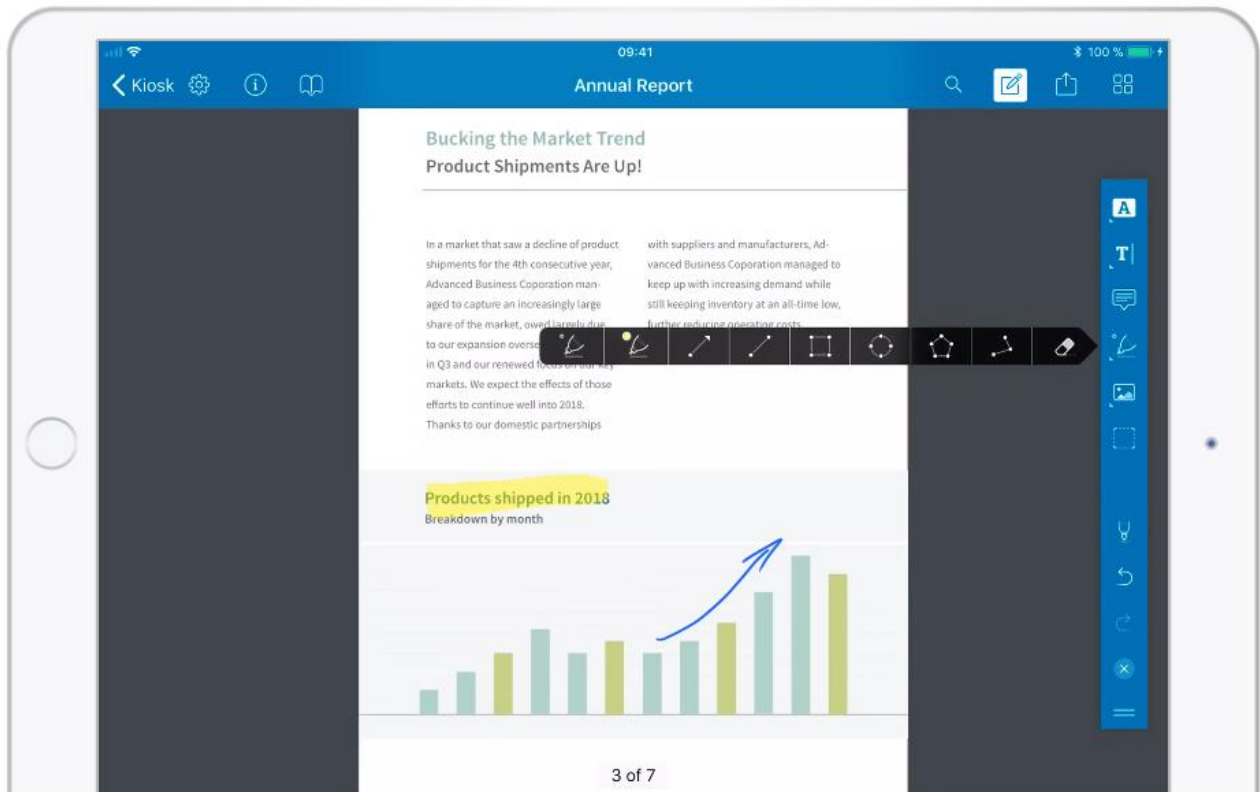
When viewing and editing files on the iPad, you may find that the formatting of your files can not be maintained by the various apps you can use to edit. As a result, you will likely find it easier to edit files while on a computer.

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 the application called *Pages* works fairly well but it cannot display some fonts and formatting. The MS Office apps for iPad will not do this but may limit your ability to make changes and save the file back to Huddle (or any other application).

[Click here to watch a video outlining outlining how to edit files while on an iPad.](#)

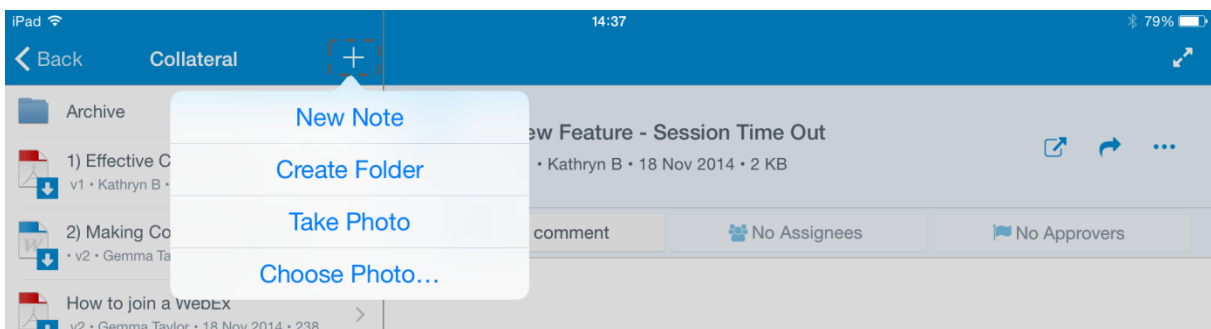


While viewing a PDF Document in the iOS app (and assuming you have the appropriate permission level to edit that document in the workspace), you will notice an additional pencil icon in the top right. This will allow you to edit your file without leaving the app. You have options to insert comment boxes, free hand text, highlight, and more. The annotations are saved back to Huddle as a new version of the file in the workspace (not a personal copy).



Creating content

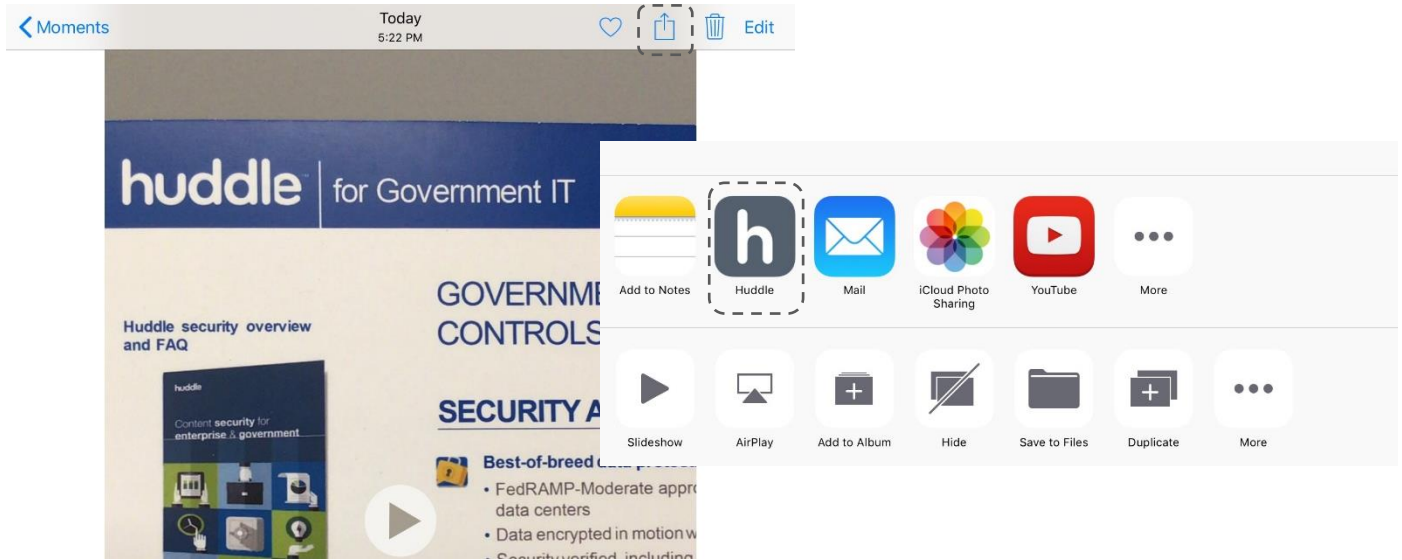
There are a few items that you can create in Huddle while using the iPad app. These include folders and notes. You can also take a photo or upload a photo using the Choose Photo option.



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

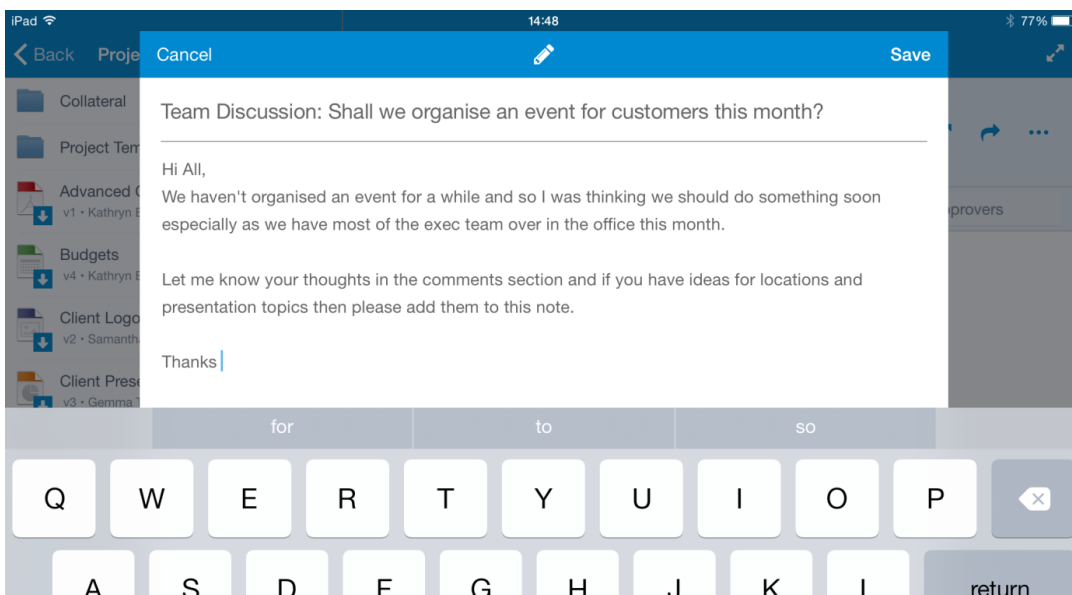


Use the Huddle web application to create new workspaces and more easily upload files in bulk.

Creating a New Note

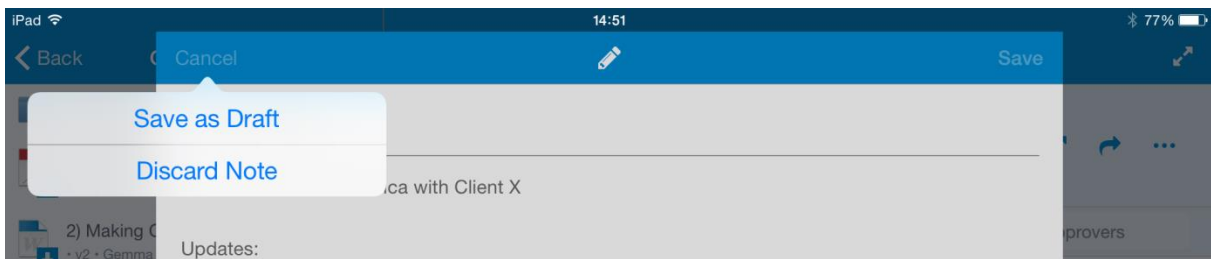
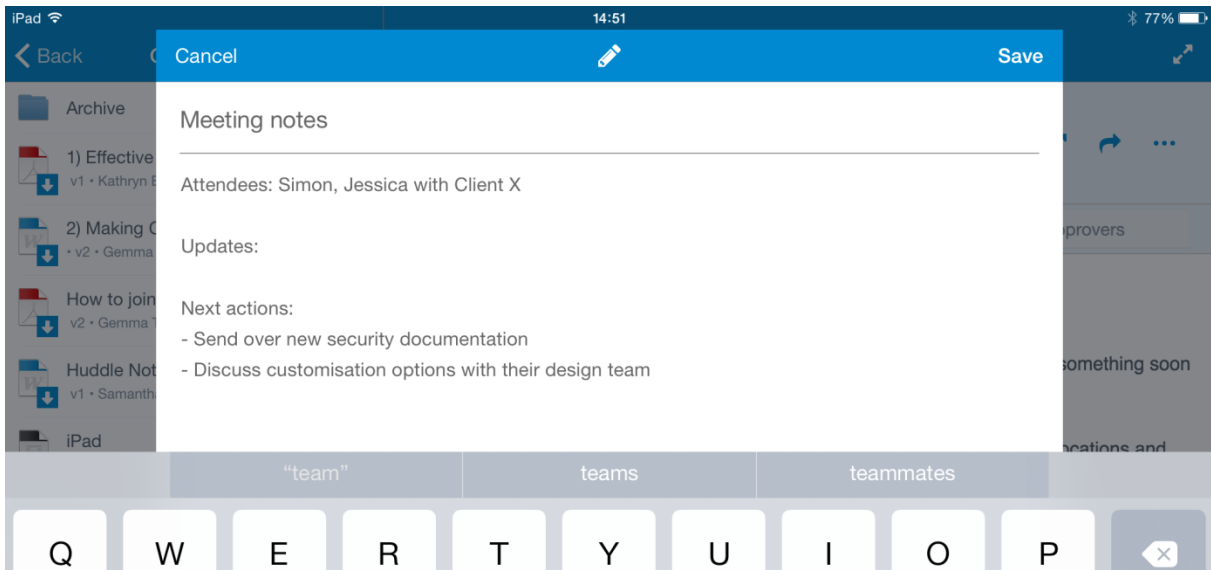
Notes are a great way to send messages to workspace members and share information that does not need to be formatted as a document. You can start a discussion in your workspace by creating a note and asking people to comment underneath (just as you can with a file).

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.

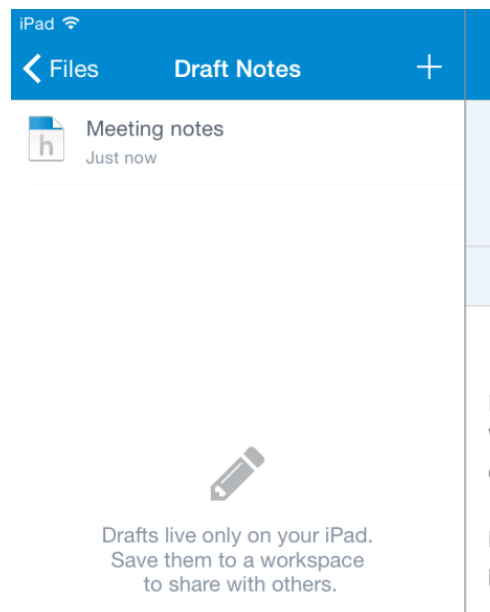
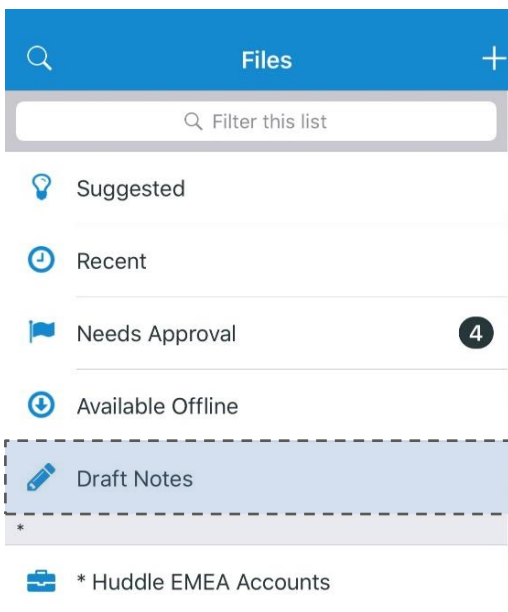




You may wish to use a Huddle note on your iPad and keep it as a draft to save into a workspace later. Simply start your note as above but instead of saving it, select 'Cancel' and then 'Save as Draft'.



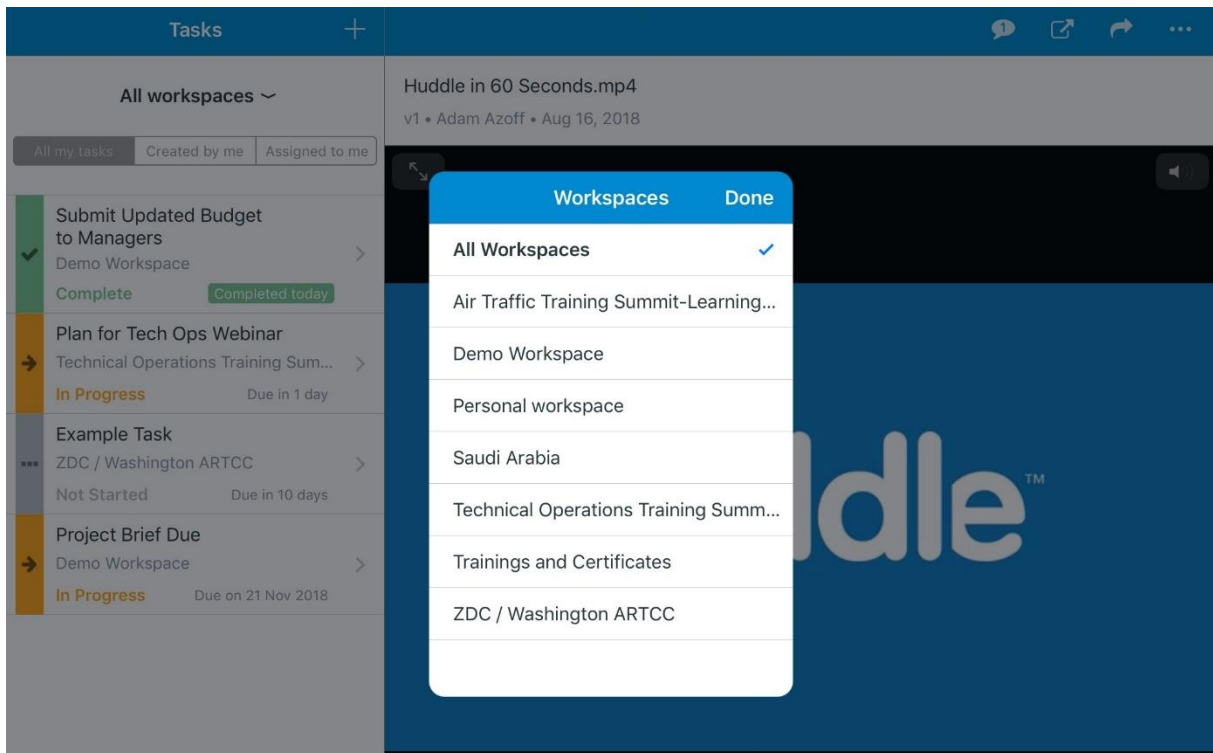
Your note will be saved in a new section called 'Draft Notes' on your Files page.



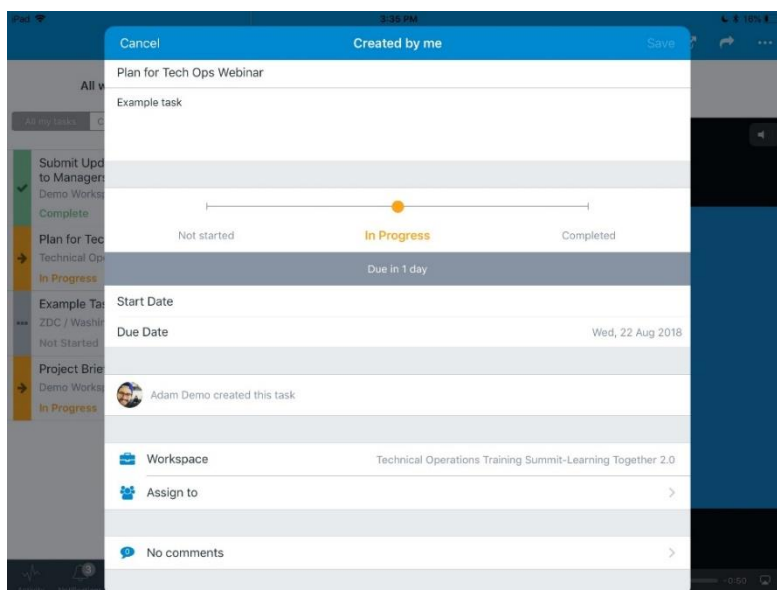
If you sign out of the Huddle app then your draft notes will not be saved. If you stay signed in then you can return to your draft notes and continue to edit them. To delete a draft, swipe to the left on the note in the drafts section and an option to delete it will appear.

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.



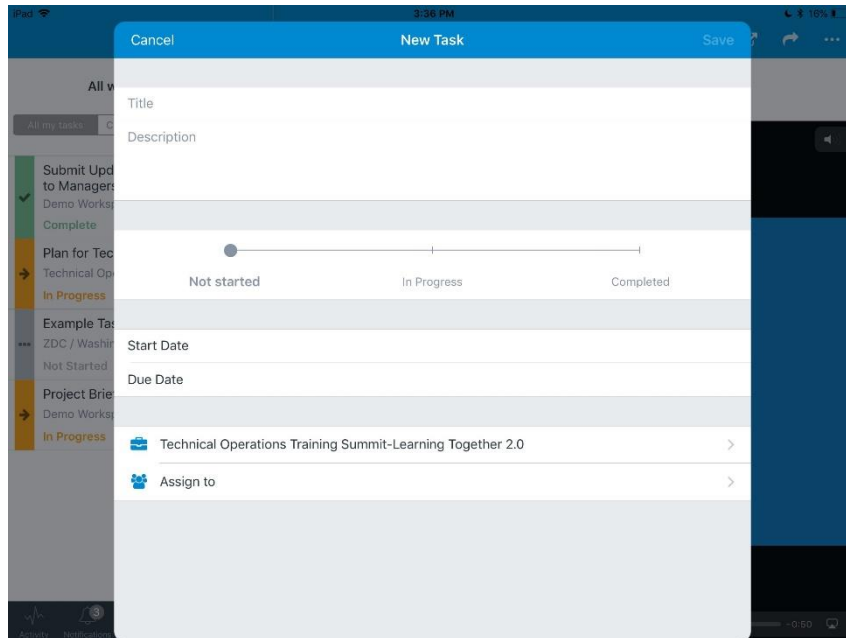
If you have permission to edit tasks (i.e. you are the workspace manager or the creator of the task) then you can add or change the assignees and edit the start and due dates. If the task is assigned to you it will be possible to change the status of the task from 'not started' to 'in progress' to 'complete'. 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.





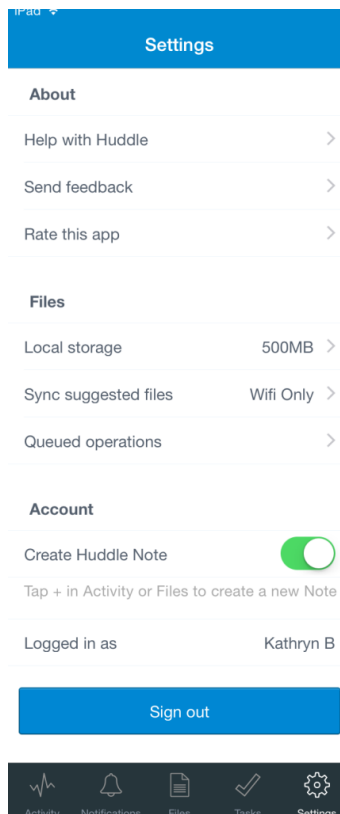
To add a task description (to an existing task), you will need to use the web application. Custom task fields are also not compatible with the iPad app – to view, edit, or filter by these it is necessary to use the Huddle web application in a browser.

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 on your device as well as sign out of the application.





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)