



Pocket Informant

By Web Information Solutions, Inc.

Innovation in Personal and Business
Information Management

for the Pocket PC ® Platform

Quick Start Guide

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Installation

Once you have downloaded the Pocket Informant installer, you can run the installer, which will begin the process of installing Pocket Informant to your Pocket PC. The installer will copy the files first to your ActiveSync directory and then run the ActiveSync Program Manager. The ActiveSync Program Manager will begin by looking for the installed applications on your Pocket PC and then it will ask if you would like to install Pocket Informant into its default directory. The alternative is to install Pocket Informant on an external memory card (MMC, Compact Flash, or IBM Micro drive). Pocket Informant has no limitations on where it is installed. At this point, Pocket Informant has been installed!

STORAGE CARD INSTALL NOTE: There is one caveat about installing Pocket Informant on a storage card. If you assign your hardware buttons to a Pocket Informant utility app, your Pocket PC may hang if you pressed the button while the Pocket PC was off. This is because some memory/storage cards take up to 5 seconds to initialize and if the Pocket Informant apps are on the storage card, your Pocket PC cannot get to them. This is not anything we can change as it is due to an OS issue and timing.

Foreign Language Installation

The desktop installer also contains foreign language installations. These will install after Pocket Informant has been installed on the desktop and will put a localized version of the resources in the program directory. Currently, the French, Spanish, Dutch, and German Install are provided in our desktop installer.

Registration

Pocket Informant is distributed as one application for both Trial and Registered users. We also distribute Pocket Informant at both online resellers and in Retail stores such as Staples or CompUSA. Retail versions of 3 or 4 are pre-registered. Earlier retail versions come with a registration key in the box.

If you received Pocket Informant on a CD as part of the device, check with the manufacturer to see if it is a demo copy or a pre-registered version.

You can purchase the Pocket Informant product online here:

<http://www.pocketinformant.com/download.php>

If you have purchased and need to receive a registration code, visit here:

<http://www.pocketinformant.com/register.php>

Order numbers from a reseller may not show up in our system for up to 24 hours after purchase. First try about 10 minutes after purchase and if it does not show up, wait 24 hours and try again. If it still does not appear, visit our support web site at <http://www.pocketinformant.com/info.php>

Once you receive your registration code, it will be in the form of a #-B#####-###. Enter that alphanumeric code into the Tools/Registration menu.

Quick Start

This section will provide some basic information on how to use Pocket Informant. Before continuing, make sure you understand the following Pocket PC conventions:

- Tap and Hold
- Drag and Drop
- Menu selection
- Single Tap
- Double Tap

The following quick start is broken down by section of user interface, Calendar View, Notes View, Tasks View, Contacts View, Search View, and some basic descriptions of features. The reference guide will provide more detailed information.

User Interface

The majority of the user interaction with Pocket Informant will consist of tapping to select an item or navigate through the user interface, tap and hold to bring up contextual menu items, or dragging items for managing your data.

Tapping

Pocket Informant follows the Pocket PC principle that a single tap opens an item. We also provide some more powerful options through tapping that we call “Direct Editing”. It is equivalent to clicking on a link or hotspot in a web page or within Windows XP. For example, in the Tasks View, you may see (depending on your format preferences) a line of data like this



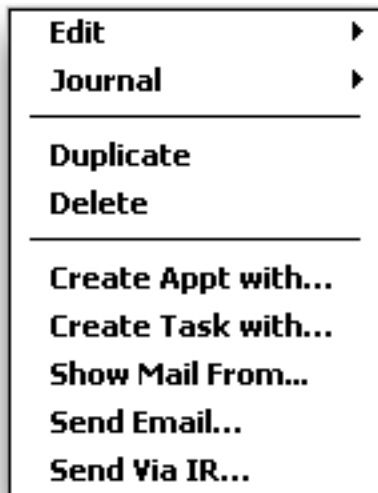
If you tap on the date, you will immediately be taken to the date editor for that task. You can then move a task to a new date with just 2 taps. If you want to change the importance (High/Normal/Low), just tap on the Importance area. Another direct editing function in Tasks is tapping on the ABC/123 Priority areas. In the Calendar view, you can tap on date headers to create new appointments/tasks on those dates.



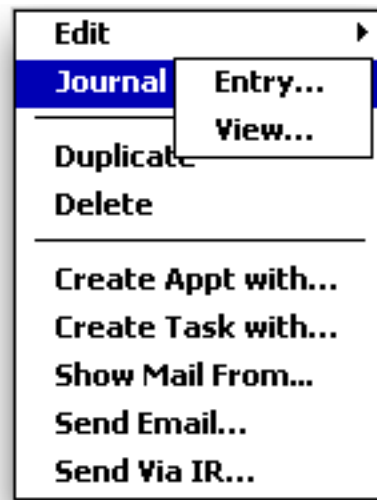
As you see on the left, you may also see several items at the bottom that are Pocket Outlook plugins. These are used automatically by Pocket Informant. The two shown on the left - City/Flight Appointment - are from City Time 1.7.

Tap and Hold

The tap and hold operation is used throughout Pocket Informant to provide access to most of the features that can be applied to an item. For example, to record a Journal item, you would tap and hold on an appointment/contact/task and get a menu like this one (for Contacts)



You would then choose Journal and Entry.



Tap and hold is used throughout Pocket Informant. Many elements have it – including Date Headers in the Calendar Views, day boxes in the Month View, and of course, every item displayed. We'll detail some shortcuts later that use tap and hold.

Drag and Drop/Multi-Select

Drag and drop operations are useful for things like moving an appointment from one day to the next or moving a task from one group to another. Within Pocket Informant, we have enabled Drag and Drop through a single tap and immediate *diagonal* drag motion. It is important to start the drag quickly or you will get the tap and hold contextual menu instead; as it is important to drag diagonally or you may get a multiple selection instead.

Whenever you perform a drag and drop, you may get tooltips that provide you with information on what information you are changing as well as a visual representation of the item you are dragging.

Drag and drop is supported in the following areas:

- Task View with Grouping - change priority, importance, completion, and categories by dragging them to a Group Heading or an item of that group (for example - dragging a task to a new ABC/123 priority level)
- Task View with Hierarchical Tasks - assign tasks to parents
- Week View
- Month View with a Detail Window displayed
- Day View

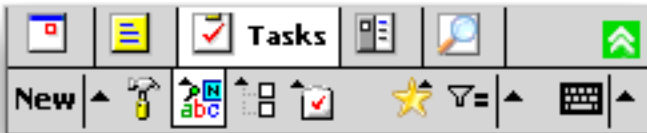
Because the interface of the Day View consists of both rows of data (the background that represents the time of day) and the floating boxes of appointments, the user interface is a little different. In the Day View, to move an

appointment up or down, you would drag the handle and drop up or down – not diagonally.

Multiple selection is very similar in action to drag and drop, but is useful for selecting multiple items to perform a common action. To perform a multiple selection, tap on an item and immediately drag down or up. If you do not drag up or down immediately, you may get a contextual menu instead.

Common Interface Elements

Within Pocket Informant, we strive to provide consistent menus and options. You will find that every view has a few standard menus and these menus offer a wealth of options and power for each view. We'll show a few of these common menus here with some general information on what they provide.



TOOLBAR MENU



The toolbar menu gives you the ability to switch between three possible toolbars – Filter, New Entry, or ABC (for Contacts). You can also turn the toolbar off. It is not recommended to turn the toolbar on in the Calendar View.



OPTIONS MENU

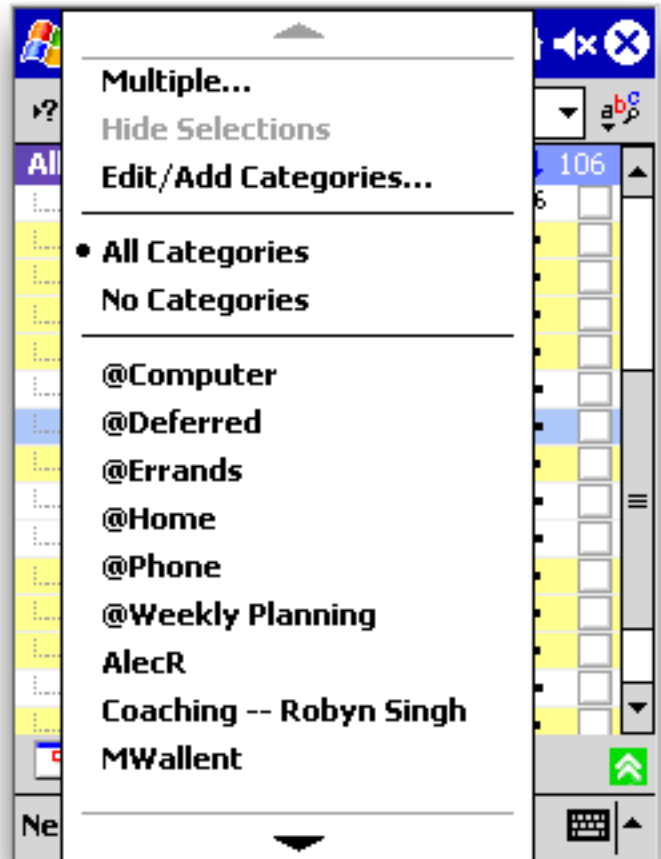
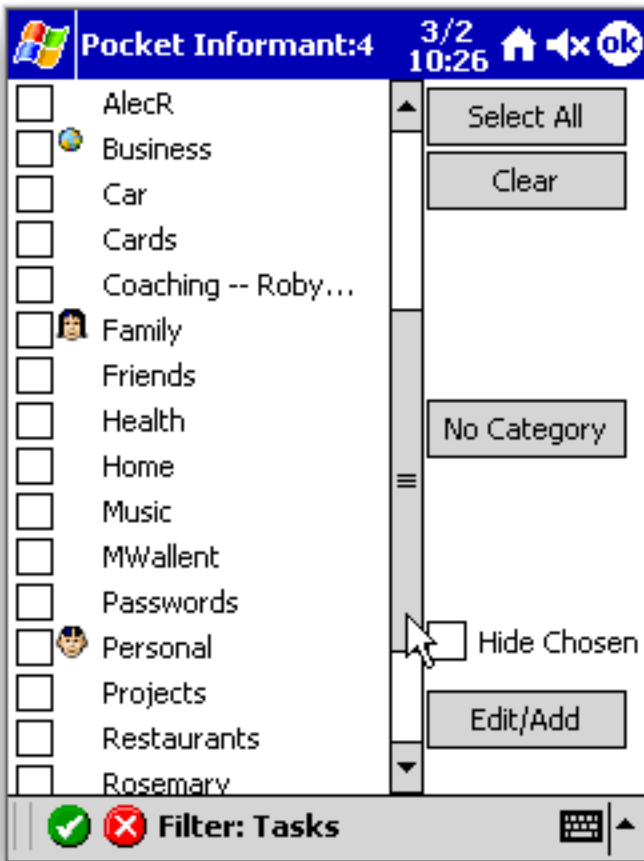
This is the heart of Pocket Informant customization for every day use. In this menu – you'll find most of the options that you may want to change more often than once as well as View specific filters or commands. We recommend you go through each view and look through each menu.

CUSTOM VIEWS

Custom Views are saved states that store your current search, filter, options, and any other relevant information for quick retrieval. For example, you can setup a Custom View to show you all your Journal Entries in the Search View with one tap. Or a custom view to show you all your upcoming business related tasks that are due within the next day.

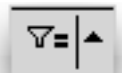


All you need to do to create a Custom View is setup a view just the way you want it – tap on the Custom View icon and tap – Save Custom View. Give it a name – and that’s it!



CATEGORY FILTERING

This menu is a split menu – in other words it has two interfaces depending on what you want to do. The left side is a menu button that brings up the Category Filter dialog which allows you to filter by multiple categories or quickly scroll through a large list of categories. The right side is a menu for quickly selecting one category or All or None.



TO TOP

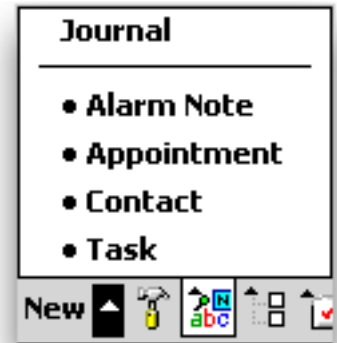
This button is used to bring you quickly to the top of a list. Much like a “Home” key on your keyboard. In the Calendar View’s Day Subview – this button will bring you back to your default begin-



ning setting of first appointment or current time.

GLOBAL NEW

The Pocket PC provides a global New menu that is by default turned off. You can turn it on by going to the Start menu and tapping on Settings. Then go to the Menus applet and go to the last tab. Turn on the Global New Menu. When you do, you'll be able to create Pocket Informant appointments/tasks/contacts/alarm notes from any application that supports the New Menu.



TEMPLATES

Pocket Informant provides a powerful feature called Templates which allow you to create appointments or tasks based off saved data. To create a Template, tap and hold on an appointment or task. Then go to the Tools menu and choose "Save as Template". Give it a name. If you put the macro character "%s" (without the quotes) into the name, that part of the Template will use the current text in the Subject and replace the %s with that text.

To apply a template, create a new appointment or task in any way. Then tap on the Template menu and then tap on the template to apply. You can find more information about this feature here: <http://www.pocketinformant.com/forums/viewtopic.php?t=827>



Shortcuts/Tips

Here we will point out just a few shortcuts that you may find useful.

1. Double tapping on the Calendar View bottom tab will maximize the Calendar View hiding the right hand side.
2. Double tapping the bottom tab for Notes/Tasks/Contacts Views will toggle the Preview window on and off.
3. Zoom your Month View by selecting and immediately dragging left/right/up/down. This lets you create graphical Week Views or many combinations. Here is a link that helps explain it: <http://www.pocketinformant.com/forums/viewtopic.php?t=318>
4. Searches in the Search View support the wildcard characters "*" and "?". This allows you to search for any number of characters using "*" character or one wildcard using "?". An example would be looking for a phone number like this "512*" to find all contacts with an area code of 512.
5. You can tap and hold on the Calendar Sub Views' tabs to get access to their options quickly.
6. Our time picker has a very powerful Duration Picker. Visit here for more info: <http://www.pocketinformant.com/forums/viewtopic.php?t=248>
7. In all views the joypad is used extensively. In the Day view, for example, clicking the action button changes the hour breaks. In Month View, it is uses many different modes of joypad navigation. In Contacts View, left/right will filter by letter. Etc....