Before Getting Started

System Requirements
Pocket Informant™ iPhone / iPod Touch requires the following minimum configurations:

- iPhone (3G, to 4) or iPod Touch (2nd to 4th generation)
- iPhone OS 4.2 or higher

Getting Started

Installing Pocket Informant™
Pocket Informant can be installed from a computer by way of iTunes syncing with your iPhone/iPod Touch or over-the-air from the App Store directly to your device. This user guide was written for the iPhone/iPod touch. It is possible to run this version of Pocket Informant on the iPad however it has not been optimized for that device. Pocket Informant HD is a separate version of Pocket Informant that has been optimized for the iPad. Pocket Informant HD is currently available on iTunes.

Launching Pocket Informant™
After installing Pocket Informant, you will see its icon on one of your Application screens. Tap the Informant icon to launch Pocket Informant and begin using it.

Removing Pocket Informant™
Pocket Informant is uninstalled just like any other iPhone/iPod Touch application. Removing Pocket Informant will remove all your data permanently!

To uninstall Pocket Informant, follow these steps:

Using iTunes
1. Go to the Applications tab when syncing your device and deselect Informant.
2. Click the Sync button in iTunes. This will remove the application from your device.

On Device
1. Hold down the Informant icon until all of the icons start to “shake.”
2. While shaking, each icon will have an “X” in the top-left corner. Tap the X near the Informant icon and this will prompt the device to ask if you want to remove the application.
3. Tap Delete to confirm that you want to remove the application.
Pocket Informant™ 2.0 what's new?

For Starters

Whether you are a Pocket Informant newbie or seasoned veteran that has seen Pocket Informant on various platforms over the years, a better question at the moment is what isn't new in Pocket Informant 2.0? Well for starters the reliable management of your events and tasks remains unchanged. The award winning features that you are used to have all returned in Pocket Informant 2.0. The look and feel is familiar but has been updated and is even more user friendly than before. Many of the changes are technical items that operate behind the scenes such as an improved database, enhancements to performance and other significant structural changes.

What will you see? Probably the single most important upgrade to the iPhone/iPod Touch user interface is the addition of the scrolling tab bar. This new feature allows PI to be even more flexible and allows room for future capabilities to be added. The tab bar at the bottom of the screen moves left to right with a swipe. The buttons can be re arranged any way that you would like, to make sense to you, and they can be displayed in three different sizes.

Many new features have been added and are detailed throughout this user guide, following are some of the more major improvements added in 2.0;

Contacts integration: Pocket Informant now has full access to the iOS contacts database. Contacts can be edited, added, and deleted from within the Pocket Informant application. Additionally events and tasks can be created directly from a contact.

Notes: Pocket Informant now has the ability to store and manage notes, they can be typed in, or voice notes can be recorded within the app. In the Notes view the notes can be stored, sorted and emailed. Notes can be synced with ToodleDo or with Outlook via the WDS sync.

Google Task Syncing: Pocket Informant can now support the syncing of Google Tasks, this feature was one of the most requested by our customers. Tasks can be synced from PI to Google and vice versa. (Only one Google task account is supported at this time)

Multiple Google Account Calendar Sync Support: Now you can have multiple Google calendars syncing events to and from Pocket Informant at the same time. So for example, you can have one Google account for your personal events and another for your work events and sync them both.

Task Start Times: This was an often requested feature from our customers and now it exists. When creating a task in Pocket Informant a start time can now be set. By adding a start time to your tasks you can narrow and in some cases more accurately then ever manage your time.

Individual Event Time Zone Support: Pocket Informant 2.0 allows you to set a separate Time Zone for the start time, end time, or for your events. It's now possible for example, to create an event that has a start time in the CDT time zone and an end time in the PDT time zone. Pocket Informant, depending upon the view chosen, will display the event in the current time zone time, or on other views it will display the chosen time zone time clearly labeled as such.
Calendar Time Zone Support: It is now possible to create entire calendars in a specific Time Zone. For example, if you live and work in the CDT time zone, you can make a calendar and set the time zone to EDT. Any events or tasks on that calendar will show up with that calendar's time zone, and will be labeled as such in the views.

Smart Groups: In the task view it is now possible to create user defined task filters. These filters can have multiple user defined conditions set to give you the ultimate control over your task viewing. You can set up as many smart groups as you would like.

An Enhanced User Interface: Double Tap in the Month View to go directly to the Day view: This new feature allows you to double tap a day in the Month View and be taken directly into the Day View for that day. This is a great shortcut and time saving feature to see where you are at in a day.

Sliding Tab Bar: This tab bar at the bottom of the Pocket Informant screen allows you to arrange the tab buttons in a way that makes sense to you. With a slide left or right you can see other menu options as well. The tab bar can be displayed in one of three different modes, icons and text, icons only or text only, so that you can use a view that best suites your preferences.

Calendar Filtering Per View: In previous versions of Pocket Informant a calendar filter selection set, for example, in the calendar view applied to all of the views in Pocket Informant. Now in 2.0 the calendar filtering is per view. So the calendar filtering that you set in the calendar view can be different from the calendar filtering that you are using in the task view.

Improved Search Capabilities: Pocket Informant 2.0 has a more refined search function than its predecessor. Now when you are searching for an item the search can be limited to events, tasks or contacts. This speeds up searching by allowing you to only search the information that you are looking for. For example if you are searching for an event you can tell Pocket Informant to only search events, that way you will not have task or contact information mixed in with your search results.

A New Swipe Accessible Menu: For tasks and events swiping on an individual item opens up a new shortcuts menu that offers one button access to common operations.
Getting Familiar with Pocket Informant™

Introduction
Pocket Informant is designed to be easy to use. Every feature in Pocket Informant is designed to be as intuitive and simple to access as possible. With the release of Pocket Informant 2.0 we’ve added many new features to help you better than ever manage your calendar and to-do items. So to get the most out of the All New Pocket Informant 2.0, please take a moment to review this user guide.

Context Location Alerts
On iOS devices running iOS4.x that support the option and beginning with Pocket Informant 1.5 Pocket Informant has the ability to set off an alert when you are close to one of these contexts. This is best illustrated this way. If you have a context called “shopping” and you give it an address for the store, then build a task for shopping that is active, Pocket Informant will watch for that store. If you happen to find yourself near the store, Pocket Informant will sound an alarm to remind you that you have an active task at that location. This feature is activated in the task settings under the main settings tab. This feature uses the device’s cellular radio to determine the location and report changes in that location, allowing the system to manage power usage much more aggressively than it could otherwise with the end result being the least amount of possible of power consumption for this feature.

Terminology
The term “iPhone” in this User Guide is intended to include the iPhone and iPod Touch. Listed below is a quick explanation of some of the key terminology used in Pocket Informant.

<table>
<thead>
<tr>
<th>Events</th>
<th>These are appointments, meetings, and Calendar items.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>These are the task or “to do” items.</td>
</tr>
<tr>
<td>Calendar Item</td>
<td>This refers to something that is either an Event or a Task</td>
</tr>
<tr>
<td>Calendar</td>
<td>Each Event or Task belongs to a Calendar. Calendars are directly related to the concept of calendars in Google Calendar or iCal (or &quot;Categories&quot; in Outlook) and can be colored to your preference.</td>
</tr>
<tr>
<td>Contacts</td>
<td>These are the entries in the native contacts application. They can be edited within Pocket Informant.</td>
</tr>
<tr>
<td>Attendees</td>
<td>These are contacts that have an email address on them. When selected in an event an invitation can be sent to them via email.</td>
</tr>
</tbody>
</table>
User Interface

Pocket Informant has multiple Views to manage your information. Each View constitutes its own area of work. Each of the Views integrates with the others and has a similar interface.

There are seven basic Views, which are selected using the buttons on the Tab Bar at the bottom of the screen. The seven basic Views are as follows:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td>This is a View of today’s items, such as Tasks, appointments, alarms, and meeting attendees for today's appointments.</td>
</tr>
<tr>
<td>Calendar</td>
<td>In this tab you will see your Calendar in Month, Week, Day, or List View.</td>
</tr>
<tr>
<td>Task</td>
<td>You can manage your Tasks from this View. This View contains several pre-defined filters to efficiently find the Tasks you are looking for. It provides quick access to the Inbox, Project, Context, and Next Action groupings.</td>
</tr>
<tr>
<td>Contacts</td>
<td>The contacts view is a new multifaceted view that allows you to add, edit, delete, call, email, or create events and tasks from a contact.</td>
</tr>
<tr>
<td>Notes</td>
<td>The Notes View allows you to type or voice record notes for later use. This view also shows tasks and events that have comments on them.</td>
</tr>
<tr>
<td>Search*</td>
<td>This View activates the Pocket Informant built-in search engine to allow for quick searching of Contacts, Events, Projects, Contexts, Notes or Tasks.</td>
</tr>
<tr>
<td>Settings</td>
<td>All Pocket Informant settings are accessed and changed in this View.</td>
</tr>
</tbody>
</table>

See the section of this guide titled “The Views” for more information on the different Views.
**Property Icons**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>⏰</td>
<td>This item has an alarm</td>
</tr>
<tr>
<td>🔗</td>
<td>This item is recurring</td>
</tr>
<tr>
<td>⚙️</td>
<td>This is an exception to the recurrence pattern</td>
</tr>
<tr>
<td>📝</td>
<td>This item has a note</td>
</tr>
<tr>
<td>👥</td>
<td>There is an attendee for this meeting</td>
</tr>
<tr>
<td>🌟</td>
<td>You have flagged this Task item</td>
</tr>
<tr>
<td>⚖️</td>
<td>This task is a sub-task</td>
</tr>
</tbody>
</table>

**General Icons**

Pocket Informant supports the use of icons on tasks, events, tags, and calendars. Included in the application is a rich library of icons suitable for most any need. The screenshot shows the icon selection dialogue. It is important to note that at this time the icons do not sync via any of the available sync options.
Basic Operations

- **Navigation Bar:** This tool bar is located at the top of the screen, just beneath the iPhone status bar. There are different options in the Navigation Bar depending on the View you are in. In many Views, it will have an action button on the left and a couple of plus signed buttons on the right. The plus sign (+) is the **Add** button and is used to add an item to a View — these items can include such things as Tasks, Events, Calendars, etc.

- **Tab Bar:** This tool bar is located at the bottom of the screen and is the method used to toggle between the different View options. New for Pocket Informant 2.0 is the ability to scroll the Tab Bar left or right for added functionality. Additionally the buttons on the Tab Bar can be rearranged. To do this simply hold a button until it shakes then drag it to the desired position. To change the appearance of the Tab Bar swipe in an upward motion across it. This gesture will toggle the Tab Bar through its various view options.

- **Gestures:** Pocket Informant supports many of the built in iOS gestures with more coming in future releases. In addition to left and right and up and down scrolling in the Calendar and Task views, Pocket Informant supports pinch and widening in when in the day(s) view. This will allow for more or less days to be shown in the grid. The tap/hold gesture in the Calendar View when used brings up a dialogue for creation of a Task or Event. New in 2.0 is the ability to drag and drop events in the calendar Day. Simply press down on an event until a frame appears around it then use a dragging motion to move the event to the desired start time and let go or “drop”. The event will automatically be edited to show the new start and end times. View

- **Adding Events:** Events can be added from any of the Calendar Views or the Today View. This is done by tapping the **Add** button (+) located in the top right of the Navigation Bar. Tapping this button will bring up an editor that you will use to create an Event. The blanks for creating an Event are self explanatory and easily understood. When all of the information is entered, simply press the **Done** button in the upper right of the Navigation Bar to save the new Event. In a Calendar View, you can also tap-and-hold on a date, and the Add Event/Add Task dialog will come up, preset
with that date. Please see the Creating Events Overview below for more a more detailed explanation of event creation.

- **Adding Tasks:** Task items are added in a similar fashion to Events. From the Task screen or any of the calendar views, tap the *Add* button (Check+) and fill in the blanks. When finished, press the *Done* button in the upper right of the Navigation Bar to save your new Task item. Please see the Creating Tasks Overview below for more a more detailed explanation of task creation. **TextExpander Touch:** If you have this application installed on your device it will fully integrate with Pocket Informant bringing with it the ability to enter data faster by using a collection of previously defined snippets from TextExpander. TextExpander is activated in PocketInformant by going to Options->General Settings-> and setting the TextExpander slider to the “On” position. If you would like to purchase TextExpander it is currently available from the App Store.

**The Editors (Events and Tasks)**

Pocket Informant uses the same editor view for creating and editing events. Likewise the task editor that is used for creating tasks is the same editor that is used to make edits to existing tasks. To avoid being redundant the steps/fields involved in event and task creation are identical to those used in editing existing items.

When using the time and date picker in the landscape orientation it is very important to note that it will behave a little differently then it does in the portrait orientation. The date picker will appear to overlap the time picker. There is a blue triangle button off to the side that can be tapped it will slide the date picker up and down so that you can fully access the time picker and other fields.

These editors are used so commonly within the normal daily operations of Pocket Informant that we thought it would be a good idea to detail their operation early in this user guide. All of the elements that make up the events and tasks are discussed further later in this user guide.
Creating Events (Overview)

This button (+), located in the upper right of the Navigation Bar, allows you to add new Events directly from any of the Calendar or Today View(s). A tap-and-hold on any day cell will also bring up the "Create Event" screen for that date.

Event creation fields;

Event Title-This is the place where you will add the name or identifier for your event.

Template Button-Tap this button to bring up the template selection list and tap the template of choice to have that applied to your event.

Location-In this area you can type in a location for your event. It can be as precise as an address complete with city state and zip code or as basic as "conference room".

Event Location Manager-This button will open up the map view and allow you to precisely choose the geographical location of your event. See “Event Location Manager” later in this document.

Time Picker-In this area you will determine the duration parameters for your new event. The start date information is chosen by picking a date from the month grid. Next you will want to set the year. If your event is timed you will want to enter a start time. New for Pocket Informant 2.0 is the ability to set a time zone for the event start and stop times. The end date and times are selected and set the same way. For all day events simply move the “Timed” Slider to the left.

If your event is an all day occurrence you will want to slide the “Timed” slider to the far right. This will disable the start and stop times and simply list the event as something that is taking place all day. If the end time conflicts with the start time, for example if you tell Pocket Informant that the event will start at 3:00 pm and will conclude at 2:00pm on the same day you will see the time highlighted in red. That is a signal that either the start time or the stop time will need to be adjusted. Once
the Time Picker elements are set simply tap the Save button to return back out to the main editor view. In the calendar grid where the date is chosen the current day is easily identified by the blue coloring with black text. The date being selected will be in a dark blue color with white text.

**Repeat**-This is the portion of the event creation where a recurrence pattern can be built. Please see “Recurrences” later in this user guide for a more detailed explanation of the how recurrences work and how to apply them.

**End Repeat**-If you have a recurrence set up and applied to your event this field is where you decide the duration of the recurrence pattern. This can be done my selecting a date or by choosing a specific number of occurrences.

**Add Alarm**-As the field name implies, this is the area where you select the alarm parameters for the event. An alarm can be set to precede the start of an event my almost any amount of time down to minutes.

**iOS Events/Calendar**-If your default calendar setting in PI is an iOS calendar then the next field will be labeled as iOS Events. Here you can set the calendar that the event will be residing on. This will vary depending upon your Pocket Informant configuration. If you have iOS events turned off or have set the default calendar to be a calendar other than an iOS calendar the available fields will look different.

*Since iOS is the default we will explain that view through to the end then we will look at the additional fields that are available when a Pocket Informant native calendar is selected.*

Following the iOS events field is;

**Sensitivity**-In this field you can label the sensitivity of the event that you creating.

**Comments**-In this area you can enter any notes or comments that go with the event.

*When a Pocket Informant native calendar is selected the following additional fields are available.*

**Add Attendee**-Anyone in your contacts list with an email address can be added as an attendee to your event, attendees can be directly notified of the event via Pocket Informant. See “Meeting Requests” I
**Tags** - You can “tag” your event to make it easier to filter or to give it a unique identifier when you view it.

**Icon** - A great visual way to differentiate your event is to give it an icon. Pocket Informant provides a standard collection of icons that can be applied to your event for even easier “at a glance” identification.

Under the comments field you will see three new buttons. These buttons all serve a specific function as outlined below and are new for 2.0.

**Camera** - This button, on devices with a camera, will allow you to immediately take a photo and have that photo attached to your event. It is important to note here, that photos taken this way are not added to camera roll of the device and only reside in Pocket Informant on the event.

**Photo** - You can tap this button to go to the library of photos on your device. You can then select a photo to be attached to the event.

**Contact** - This button will allow you to add a contact to the event. This is different from an attendee. As attaching a contact is more akin to attaching a business card to the event. Contacts will not receive an email regarding the event.

Once all of the data that you want in the event is there, simply press the “Done” button to add the event to your calendar. If your calendar is synced, pressing the “Done” button will initiate a sync. If your event is added to an iOS calendar the event will be added to the iOS database a few seconds after pressing the “Done” button.
Creating Tasks (Overview)

This button (Check+), located in the upper right of the Navigation Bar, allows you to add new Tasks directly from the Task View, any of the Calendar or Today View(s). A tap-and-hold on any day cell will also bring up the "Create Task" screen for that date.

To add new Folders/Projects, Contexts, or Tags from the Task main view, tap that item then scroll the screen down. This will reveal the “Add” button.

For a further explanation of the basic task creation fields and process please see page 31 of this user guide.

Task creation fields;

Star-This is a button that will activate the star feature of a task. The star will be in view in all
of the task views and filtering.

**Task Title**-This is the area where you will name or identify the task.

**Template Button**-Tapping this button will bring up your list of task templates. Select the template of your choice here.

**Date/Time Picker**-In this area you will determine the duration parameters for your new task. The date information is chosen by picking a date from the month grid. Next you will want to set the year. If your task is timed you will want to enter a start time. Due dates and times are set in the same manner.

If the end time conflicts with the start time, for example if you tell Pocket Informant that the task will start at 3:00 pm and will be due at 2:00pm on the same day you will see the time highlighted in red. That is a signal that either the start time or the stop time will need to be adjusted. Once the Time Picker elements are set simply tap the Save button to return back out to the main editor view. In the calendar grid where the date is chosen the current day is easily identified by the blue coloring with black text. The date being selected will be in a dark blue color with white text. The red badge can be tapped to change the current selection to “None” such as the start date or time. When using the “None” option the date picker will disappear.

**Context**-Contexts can be added in this field. If there are already contexts existing you can select one from the list, if you need to add a new context that can be done from this view by simply typing in the name of the new context and tapping the “+” button. That will create the new context and assign the task being built to it. See also “Location Alarms” on page 7 of this guide.

**Folders/Projects**-Depending on your chosen task mode this field will appear either as “Folder or Project”. In this field you can select a folder or project for your new task to be assigned to. If need be you can also add a folder/project in this view by entering the name and tapping the “+” button.

**Parent**-To assign a parent task to the task being created tap this field. It will open a list of tasks, tap the task that you wish to designate as the parent. A task can only have one parent. A parent task can have multiple children.
**Action**- In this field you can assign an action to your task. Tapping this field will open up the full menu of choices. Simply select the item of your choice by tapping and it will be assigned to your task.

**Priority**- Set the task priority in this field. Tapping the field will open the priority choices.

**Completion Percentage**- This slider allows you to set the amount of completion for the task.

**Repeat**- In this field you can set a recurrence pattern for your task. See “Recurrences” later in this guide for specific information on how to use recurrences.

**End Repeat**- In this field you will determine the duration of the recurrence pattern that you set up.

**Add Alarm**- In this field you can set a reminder alarm for your task. The alarm can be set for the date of the task, or days before the task. It can also be set to go off at a specific time if you choose to have an alarm on the day the task is due.

**Calendar**- This is the field where you will determine what calendar your task will be assigned to. At this time iOS calendars cannot support Pocket Informant tasks so those calendars do not show up as available options.

**Tags**- A tag can be assigned to your task for easier sorting and tracking. Simply tap that field to bring up a list of tags. If you need or want a tag that isn’t present simply enter the name you wish to use for the tag and tap the “+” button. This will create the new tag and assign it to your task.

**Icon**- For quick and easy visual identification you can add an icon to your task. Pocket Informant has a standard library of icons available.

**Add Child**- If the task your creating needs child tasks assigned to it tap this field to bring up a list of existing tasks. You can choose tasks from this list to be assigned as children to your task.

**Enter a Child Task**- Tap here to create a new child task. Using this method to add a child task will result in a new (subtask) being created that will inherit the properties of the task you are creating. It will be assigned to your task as a child.

**Sensitivity**- In this field you can set the sensitivity level of the task, tap the field to open the menu and select your choice by tapping on it.

**Comments**- In this field you can add any notes or comments to the task.

**Camera**- This button, on devices with a camera, will allow you to immediately take a photo and have that photo attached to your task. It is important to note here, that photos taken this way are not added to camera roll of the device and only reside in Pocket Informant on the task.
**Photo**—You can tap this button to go to the library of photos on your device. You can then select a photo to be attached to the task.

**Contact**—This button will allow you to add a contact to the task. Attaching a contact is akin to attaching a business card to the task. Contacts will not receive an email regarding the task.

Once all of the data that you want in the event is there, simply press the “Done” button to add the task to your calendar. If your calendar is synced, pressing the “Done” button will initiate a sync.
The Views

**General Task/Event View Operations**

To view the details of a calendar item (Task or Event) tap that item. This will open a new View that shows the item information in detail. Along the Navigation Bar at the top there are two buttons. The button with the current date on it will return you to the currently selected view. The **Edit** button on the right will allow you to edit the item currently being displayed. The edit screen is identical to the other editor views throughout Pocket Informant. (Please see the section on page 12 of this user guide for a detailed explanation of adding and editing events and tasks.)

In the lower portion of the Event/Task detail view screen there are four buttons. For Events, from left to right, the buttons are Delete (trash can icon), Duplicate (plus sign with paper behind it), Template (iPhone with a star on it), and the action button. Tapping the trash can button on the lower-left side will delete the Event being viewed. The duplicate button will copy the event and open the editor for the duplicate allowing the user to edit the details before saving. The Template button will make a template out of the event and save it to the templates list. The last button looks like an envelope, it is an action button, it will allow the user to e-mail the event, or convert it to a task.

In the Task detail view the options are similar, at the bottom of the screen from left to right the four buttons are as follows. Delete (trash can icon), Complete (checkmark), Duplicate (plus sign with paper behind it), and the action button. Just like with the events tapping the trash can will delete the task, tapping the check mark will complete the task, tapping the duplicate button will copy the task and open the editor of the copy. Tapping the action button will bring up a set of new buttons that allow different actions to be applied to the selected task. The options are to convert the task to a project (more details on this are in the Tasks Section), convert the task...
to an appointment, save the task as a template which will add it to the task template list, or email the task.

Swiping an individual task or event now opens a short cuts menu that allows for common basic operations to be done. These include changing the start and due/end dates, emailing the item, or deleting the item without ever having to go into the item details.

In the calendar views it is possible to convert an event to a task, and to convert a task to an event. This is done via the action button in the items detail view.

**Event Location Manager**
This feature is part of the event creation dialogue. It gives you specific location information via Google Maps. It’s use is very simple. During event creation simply tap the “flag” or “map pointer” in the location field. This will take you to a map view where you can see the straight map view, a satellite view or and hybrid view that is the satellite image with an overlay of the map view. At this view you can tap the location or enter location information such as an address or business name. Once selected you will be returned to the normal event creation dialogue to complete setting up your event. In the events view in the calendar view you can tap the flag in the event view to be taken to the map view. A new sub-feature here allows you to hold a point on the map which will drop a push pin on that location. Entering a city or address that is close to where your event will take place gets you started then you can, using normal scrolling gestures, find the exact location on the map and drop a push pin there. That will the the location assigned to your event. If the location doesn’t have a name i.e.; Starbucks, then you will need to enter a name. This name will then be displayed on event as the location. This feature is not to be confused with the context location available with tasks and which will be explained later in this guide.

**Meeting Requests**
Select the Attendees cell within the Event creation window to pick an attendee for your meeting. If the contact has more than one email address, you will be asked to pick one of them. When you save the appointment, you will be asked if you wish to send a meeting request. You have two choices to send a meeting request.

- **Send via Email**
  This brings up an email box that you can add text to or simply press “Send” to send a meeting invitation created by Pocket Informant for immediate send.

- **Send via Google**
  If you have Automatic Sync turned on for Events and are synching with Google then this will request Google to send a meeting invitation for you as soon as the
background automatic sync completes.

Recurring Events

It is important to note here that for a contact to be able to be a meeting attendee that there will need to be an email address in that contacts information. Otherwise they can be added to the event as a contact.
Recurrences
Pocket Informant supports many complex recurrence types natively and allows you to create all of them within the user interface. You can create simple recurrences in the Repeat Event View and more complex recurrences by selecting Custom. Recurrences can be tricky especially with regards to tasks. When setting a task recurrence you will need to decide if the task will repeat from an assigned due date or from the date it is completed. There are several basic recurrence patterns built into Pocket Informant. If none of those quite serve the purpose you can create custom recurrence patterns.

When editing any recurrence pattern upon saving the edits, Pocket informant ask if you want the edits to be applied to the selected occurrence, all or all future. These are self explanatory choices.

When editing a recurring item in the Day View using the drag and drop method, only that recurrence of the item is edited. All future and past occurrences will not be edited as a result of this operation.

Also when editing any recurrence pattern, be mindful of where you are at in the recurrence pattern. For example if you have a ten recurrence pattern and edit the eighth recurrence and tell Pocket Informant to apply the changes to all future. Then the recurrence pattern you are in will stop with that 8th occurrence and a new pattern will start the encompasses all of the remaining occurrences.

So now if you were to go back to lets say the 2nd occurrence of that pattern and make an edit and apply the edit to all future, that edit would only go to the 8th occurrence not the 9th or10th because after the 8th a new recurrence pattern was started.
Once you press **Custom** you can create the following recurrence types directly within Pocket Informant:

- **Daily** — Every “x” number of days.
- **Weekly** — Every “x” weeks on any custom combination of days such as “Sunday and Wednesday” or “Monday-Friday.”
- **Monthly** — Every “x” months on any custom combination of days such as:
  - 5th and 19th of the month.
  - The first Monday of every month.
  - The last day of the month.
- **Yearly** — Every “x” years on any custom combination of months, such as:
  - Every Jan and June
  - The first Sunday in October every 3 years
  - The last weekday of every July

Custom recurrences for both tasks and events are one of the more complicated operations that Pocket Informant supports. To help you get the exact recurrence pattern you are looking for there is now a help button at the bottom of the recurrences screen. Tapping this button will walk you through the various custom recurrence patterns that Pocket Informant offers and how to set them up. Additionally this is a good review for long time Pocket Informant users. It is always available as a resource when setting up a custom recurrence pattern.

**Add Buttons (+)**

These buttons, located at the right of the Navigation Bar, activate the editor and will allow you to add new Events and Tasks directly from the currently selected view.

**Calendar Filter Button**

The Calendar Filter button is in the top left of the Today, Calendar and Task view. It is the one with 3 lines that looks like an inverted pyramid. To learn more about this feature, read the section on *Calendar Filtering*. When a filter is in use the button will change to a view with 4 boxes on it.

**Tasks in Calendar View**

List, Week, and Month Views can be configured to include tasks in either “In Progress” or “Due Date” modes. The In Progress mode will display a Task on every date which that Task encompasses. For example a task due a week from now will show up on every day from now until that due date. A Task which has a start and due date will show up on every date between those dates.

In Month View, if you are showing Time Bars, then Tasks will appear as red badges over the day they are due. If you are in mini-text mode, then the Task will be listed in the month cell itself with a "completion" circle next to it indicating it's a Task. In Week View, these Tasks appear under your
events in each cell, again with the "completion" circle next to them. In List View, Task cells will appear along with event cells.

You can also configure Pocket Informant to display completed tasks or to exclude them.

**Today View**

The Today View shows you the Tasks and Events occurring on the current day at a glance, as well as current Next Actions, Meeting Attendees, and Alarms. (For more information on Next Actions, see the "Getting Things Done" section below. All of these sections are user configurable in the settings.

This View allows you to simply tap an Event or Task to view its details, such as location, attendees, and notes. You can also add Events and tasks directly from this screen.

To move through multiple Events or Tasks quickly, up-and-down scrolling is available in this View. By default, the color of the title text for the Event will match the Calendar that the Event belongs to. You may also configure this View so that the background of the cell shows the color instead of the text. Events and Tasks may have one or more system icons displayed in their cells to give you some quick information about this item at a glance. Refer to the table on page 7 for an explanation of these icons. Users may also select icons from the built in library to add their own unique identifiers to tasks and events.
**Calendar View**

The Calendar View is one of the most powerful Views in Pocket Informant. This View will allow you to select from multiple types of Calendar Views: Day, Week, Month, and List Views. Events and Tasks can be added and edited from here. Calendar colors appear in these Views with the Event title and other Event information. You can also display tasks with a variety of options within each calendar view. These attributes will be discussed in further detail below.

Events and Tasks can be edited from any of the Calendar Views by tapping the item. This will show more Event detail and show the **Edit** button on the right side of the Navigation Bar. Tapping the **Edit** button will bring up an edit screen that is very similar to the Add Event screen. Once you are done editing, simply tap the **Done** button to save your changes.

Double tapping on the calendar button in the tab bar will open the “Jump to Date” dialogue. When in the calendar view a single tap on the calendar button, in the tab bar, will bring you to the current dates view.
Calendar View Selection Buttons

In the top center of the Calendar View are the main Calendar View selection buttons:

Agenda/List This button shows a List of all the Events and tasks stored in Pocket Informant. Individual items can be selected to see more detail and for editing. Scroll down for older events and tasks, scroll up for current and future tasks and events. When scrolling down for the older events a button labeled as “Previous Events” will be displayed from time to time. Pressing this button will add older data to the view and allow you to scroll through it. You can press that button as many times as you like to see data as far back as Pocket Informant has data.

Day

The Day View displays information for a single day. Event bubbles cover the duration of the Event and are the color of the Calendar that the Event is stored on or the tag if Tags are used. Navigation in this Calendar View is also done by swiping up or down for the selected day or left and right for switching between days. Holding down a time will bring up the add task or
event dialogue.

The Day View features a red line to indicate the current time. It is also available in the Week View when in the horizontal or landscape orientation. New in 2.0 is the ability to drag and drop events in the today View. To use this feature hold your finger on an event and watch for the outline to appear. When it does you can then drag the event to the desired start time within the grid, the simply “drop” the event by removing your finger from the screen. Pocket Informant will automatically edit the event with this new start time and will append the end time as well. Depending on the number of days showing tasks and events that cover multiple days now have indicators that elude to such and allow you to know at a glance that a task or event is continuing.

Week

The Week View allows you to see seven days at a time in a staggered formation. You can configure which day you would like to see on top (any day of the week or "Today"). Each day "cell" includes a "time bar" at the top with the Event listing below that. The time bar is a graphical representation of the hours in a day with Events shaded in. (The left-hand side of the time bar is 12:00 A.M. and the right-hand side is 11:59
P.M. for that day.) The gray-shaded area represents your work hours, which are selected in the Settings tab. This time bar while highly useful is an item that can be turned off if desired. Events/Tasks in this view can be tapped to view their details.

You can swipe left or right to move between weeks in this View. Tapping a day cell will will take you to another view known as the Week View Detail. Here you will see the currently selected week as a row of cells along the top of the screen. The current day will be highlighted in a dark blue, the selected day will be shaded in light blue. Below the row of cells is the list of events or tasks (if enabled) for the selected day. Individual items can be tapped from the list to view/edit their details. The row of week view cells at the top of the screen can also be scrolled left and right to go to dates in the future or the past. To go back to the Week View, simply tap the Return to Week View button at the top of the screen.

When moved to a horizontal view the Week View will, by default move to a columnar view that is similar to the day view. This horizontal/grid style view allows for the same drag and drop capabilities as outlined above in the Day View.

You can add an event or task by simply holding down a specific day, this will take you straight into the create event or task dialogue. Or you can use the event and task add buttons in the top right of the view.

Month

The Month View is very similar to the Week View in its behavior. Swiping left or right allows you to navigate between months. Tapping the month name brings up the "Jump to Date" picker discussed above. Tapping on a specific day will bring you to the same horizontal "detail" Week Row View described above.
**Month Cell Style**

The cells in the month view are capable of displaying your Task and Event information many different ways. The default is Mini Text with Time. This will display your event title and the time in the cell. In the settings of Pocket Informant are many other display options for the Month View cells, these include Mini-Text, Mini-Text with colored background, Icon View and Numbers only mode.

Pocket Informant’s time bars are an innovative feature that allows you to quickly see how your day and weeks and months are filled by different kinds of appointments. The time bars in the Month View are slightly different than the ones in the Week View; a gray line separates A.M. and P.M. (with A.M. being on top). The top left of the time bar is 12:00 A.M., with the top right being 11:59 A.M. The bottom left of the time bar is 12 P.M., with the bottom right being 11:59 P.M.

However not everyone needs or wants to use the time bars. There are other view options available. These are Mini-Text, Mini-Text with time, Mini-Text with colored background, Icon View and Numbers only mode. Here is a little more detail for the other Month View cell options that were mentioned above, Mini text shows the information in a very small font within each cell and can be configured with different options, such as time display or with a colored background to make identification easier. Numbers only displays a simple number in the cell much like the built-in Calendar. The icon view shows only the events with icons on them, which allows them to be identified quickly and easily.

A single tap on a day will take you to the Month Detail View. Here you will see the currently selected week as a row of cells along the top of the screen. The current day will be highlighted in a dark blue, the selected day will be shaded in light blue. Below the row of cells is the list of events or tasks (if enabled) for the selected day. Individual items can be tapped from the list to view/edit their details. The row of week view cells at the top of the screen can also be scrolled left and right to go to dates in the future or the past. Press the “Return to Month View” button to return to the entire month view.
Task View

The main task view is divided into three sections. The first part of the view shows various groupings. These include among others, the inbox, folders/projects, next actions and more. Under that is the “Groups” area here you will see the predetermined groups that Pocket Informant uses for tasks. Some of the items included in this area are overdue, undated, completed today, etc. The next view area is the Smart Groups area. Smart groups are user created and user defined filters.

When you tap on a Group or Filter you will be presented with a list of Tasks. The user interface for the Task lists provides a quick-and-easy way to work with single and multiple Tasks.

To mark a Task completed, simply tap on the circle on the left. To select multiple Tasks at once for a "mass" operation (such as complete or delete), tap the right most (3 bar) button for each task that you want to complete or delete. To view the details or to edit the Task, simply tap the task which will open the detailed view and provide access to the edit dialogue.

This View contains a Calendar Filter button in the top-left corner and three buttons on the right of the Navigation Bar. The first button is the groupings button, this button when active presents the groupings menu just below itself. This groupings menu slides left to right and will group the tasks in the view by the selected grouping. The next button in this view is a magnifying glass or search button, tapping this button will open a menu that will allow you to search a task or add a task. The next button is the task add button, button allows you to add new Task items.

In the Today View tasks that are overdue will show both in the “In Progress” area and the “Due Today and Overdue” areas. Using the multi-select button on one occurrence will automatically select both.
Multi-Select/Delete/Complete/Edit

you can select multiple tasks and edit their details in one step or make simple group wide edits. When selecting multiple tasks you will notice a menu coming up at the bottom of the screen which has three buttons that are detailed below.

• Delete-This one is obvious, after selecting multiple tasks, tapping this button will delete all of the selected tasks.

• Edit-Tapping this button will allow you to edit the details of all the selected tasks in one step. It is important to note here, that all edits will apply to all of the selected tasks. For example if you edit the due date, all of the selected tasks will now have the edited due date.

• Quick Edit-This will likely be the most used button when in the multi-select menu. From here the user can make the multi-selected tasks Change the start date, change the due date, Due Today, Due Tomorrow, the tasks can be Starred, or marked as Completed. (The menu in this view does need to be scrolled to see all of the available options) It is important to note that if the selected tasks are all Starred then the Star function will change to Remove Star and will carry out that action if selected. If some of the selected tasks are starred and others are not the Star function will default to Make Starred. That is normal behavior and as stated above once all the selected items are starred the function again will change to Remove Star.
**Task Conversions**

Tasks can easily be converted to events or projects by pressing the bottom right button from the task detail view screen. When converted to a project the tasks children will be visible within the project.

Other operations from this button allow the task to be converted to an event or template, or even emailed. If emailed to another Pocket Informant user the task can be imported directly into their Pocket Informant.

Other useful buttons in this task detail view include the duplicate operations which looks like a plus sign. This function will create an exact duplicate of the selected task. To the left of the duplicate button is the task completion button. Tap this button to mark the selected task completed. The left most button in the view looks like a trash can. This is the delete button and will delete the selected task.

In the task detail view the star function for a task can be toggled on or off.

**Franklin Covey Task Mode**

The FranklinCovey To Do mode will change Pocket Informant’s editor and View in subtle ways. First, the GTD groupings will disappear. Second, instead of using Contexts, you are given the ability to prioritize using A-Z/1-99. Other FranklinCovey features such as Projects with hierarchical Tasks, Daily Notes, Compass, Mission, and so on are planned for a future release.

The A-Z/1-99 priorities are a powerful method of organizing your Tasks into main Tasks/sub-todo’s, or into a project’s stages. They are only limited by your own methods.

The priority system can be used in conjunction with FranklinCovey methods and techniques or you can create your own. For example, some of our users allocate the first letter as a second type of category such as “G” for Groceries.

A priority of “0” (zero) is supported as a non-prioritized letter priority. For example, “A0” would mean that you have given a To Do an “A” priority, but not any sub-priority yet. The Franklin Covey priorities do not sync via any of the currently available methods.
**Toodledo mode**

Toodledo mode is a mode designed to better mimic the terminology and behavior of the Toodledo online task system. It behaves much like the GTD system below but with a few differences described as such:

- Projects are named Folders
  You can read the GTD mode reference and simply use Folder for everything named Project instead
- Each Folder can have multiple Next Actions
- Next Actions are not automatically assigned
- During sync with Toodledo the tag is no longer used as a Calendar name
- Folders cannot have to do items manually ordered

**Getting Things Done (GTD) mode**

GTD is defined by David Allen on his website (davidco.com) and is short for “Getting Things Done.” Below is a summary of some of the highlights of this methodology, but to more thoroughly understand the motivation behind the GTD process, see David Allen's website, or read his book titled *Getting Things Done*.

GTD is a process for To Do management that contains two key elements: control and perspective. You gain control and perspective through the workflow that contains five distinct phases:

- Collect
- Process
- Organize
- Review
- Do

**Projects and Contexts**

Projects are part of the Organize phase of GTD. Every regular To Do that requires more than one physical action to achieve becomes a Project. These Projects are tracked and periodically reviewed to make sure that every Project has a “Next Action” associated with it, and thus can be moved forward.

For example, you may need to fix the alternator on your car. This one To Do becomes a Project and the subsequent Tasks might be:

- Look through phone directory for a mechanic
- Call mechanic
• Ask about estimated costs to fix the alternator
• Schedule an appointment
• Bring car to mechanic
• Pick up car

The next uncompleted action in this Project becomes the Next Action. This type of list allows you to easily see what you have to do to complete a Project and organize your time more effectively. We commonly get stuck with simple Tasks (“Fix Alternator”) on our list that we keep procrastinating because we have yet to accomplish the first step. This process breaks down the steps and makes it mentally easier to process and complete.

Now couple the list above with Contexts. Contexts can be thought of as a physical location (such as Grocery Store), or a mode of operation (such as "Phone Call") or even a time of day. For example “Call Mechanic” would potentially be associated with a “Phone Calls” Context. The next time you are making a phone call you can look at your “Phone Calls” Context and see that this would be the perfect time to complete all Tasks that require a phone call, thus moving multiple projects forward at once.

**Inbox**

Pocket Informant lets you quickly create new Tasks without assigning dates, Projects, or any other information, simply to get the Task out of your head. The Inbox is where Tasks that have no associated Project are shown. You will at some point process these Tasks by either completing them or organizing them into Projects and Contexts.

Once a Task is assigned a date, context, project, or status it is moved out of the Inbox.

**Project/Folder**

This Task Group View will allow you to see the current Projects/Folders. Tapping on a Project will show the uncompleted Tasks in that Project. Tapping on the Edit button while in the project view lets you delete or edit projects.

Tapping on the Project while in edit mode allows you to rename a project or complete it. You should always complete a project when you are done with it.
Across the Navigation Bar in this detail View are four buttons. The first is titled Project and will take you up one level in the View. The middle two buttons are View and Reorder. View is the default and will let you view your Tasks and access the standard features of the Task cell described above. To reorder Tasks (for example, you may want to move a Task to the top to make it the Next Action), simply toggle the view/reorder control and you will see the standard reorder "thumb" control (3 bar button) appear on the right-hand side of the Task cells. \textit{Note that View/Reorder are not available in Toodledo mode.}

At the far right of the Navigation Bar is the Add button (+). This button allows you to add new Tasks. If you are using Landscape orientation you will see three buttons to Group, Search/Quick Add, or Add.

Pocket Informant has a dashboard for tasks that are assigned to a project/ folder this is a summary or properties table for the contents of the folder or project. At a glance one can see total tasks, completion percentage, start and due dates to make Pocket Informant even easier to use.

\textbf{Creating Projects}

Projects are created in one of two ways.

- While in Project View you can scroll up above the first Project and press the “Create Project” button.

- While creating a new Task you can create a Project in the Project list

\textbf{Contexts}

The Context Group keeps Task items grouped by their Context. A Context is typically used to group by location or mode of operation, such as “Email,” “Phone Calls,” “Home Depot,” etc. To make use of the context location alarms you can assign a physical address to a context. If an active task is assigned to that context, Pocket Informant will set off an alarm when you are in close geographical proximity to the address in the context. The notification will let you know that you have an active task at the location.

\textbf{Creating Contexts}

Contexts are created in one of two ways.

- While in Context View you can scroll up above the first Context and press the “Create Context” button.
• While creating a new Task you can create a Context in the Context list
• It is important to note that if you are going to use the context locations that you turn on the location alarms and select an address when creating the context.

**Tagged**

Tags are similar in nature to assigning calendars. When in the Task creation mode, you can assign a tag to your task this is essentially another filter method. The defaults are “family” and “work”. Tags assign a color and can be viewed when you look at the task detail. You can quickly know what the tag is by the color, for example blue is for work so when viewing a task with a blue flag one could quickly identify that the task is work related at a glance.

To see the Tasks for a particular Context, simply tap the Context and you will see all of the Task items in that particular Context. Again, all the standard Task controls are available in this View.

**Starred**

The Starred Group keeps Task items that have been starred. You can use starred tasks as a hotlist, favorite tasks, or a quick list, a priority list or any other reason that works for you.

**Next Actions**

This Task Group View will allow you to see the Next Actions for each Project. A Next Action is the first Task that is uncompleted in a Project. You can also assign a Next Action to a Task that is not assigned to a Project if you wish, and it will show up here.
Groups

The lower middle area of the Task screen is the Group area. There are several pre-defined groups. The various groups are listed below with their detailed descriptions. The detailed group views are very similar in operation. At the far left of each group name is a bubble with a number in it if there are any Tasks in that Filter. The number indicates how many Tasks are in that Filter.

Tapping any of the Filters will show you the following, as well as the specific Filter detail:

- **All Active** This View shows all Tasks that have not been marked Completed.

- **In Progress** This View shows all Tasks that are currently in progress (meaning that it’s past the start date of that Task and it has not been marked Completed).

- **Overdue** This View shows all Tasks that are currently overdue (i.e., the current date is past the due date of that Task and it has not been marked Completed).

- **Due Today/Tomorrow** This View shows all Tasks that are due today or tomorrow. This filter will also show Overdue Tasks.

- **Undated** This View shows all Tasks that have been never been assigned a date.

- **Completed Today** This filter shows all of the tasks completed today.

- **Tasks With Comments** Any tasks that have had comments added will show in this group.

- **Completed** This View shows all Tasks that have been marked Completed.
**Smart Groups**

One of the most striking new features contained in Pocket Informant 2.0 is Smart Groups. Smart Groups can be summarized as user designed and designated filters. There are two ways to create a Smart Group. From the main Task View scroll down to the bottom of the view into the Smart Group area and tap the “information button”. This will open the Smart Group management screen. Tapping the + button will allow you to name, define and save your new Smart Group.

The other way to access the Smart Group creation and management screen is to go to Settings and Task Settings, then tap the Manage Smart Groups cell. This will take you into the same manage/edit screen as mentioned above.

The Smart Group characteristics can be set to almost any task property or combination of task properties that you can think of. Multiple rules can be set for a group and tasks can be filtered to the most finite collection. Once the Smart Group is created the tasks that meet the criteria will automatically show up there.
Task Creation Elements (Summary)

When you create a Task, you have many options within the Task screen. **Only the subject is a required field.**

Projects and Context

By selecting the Context or Project View, you can select or create Contexts and Projects for this Task. To create a Context or Project simply type in the name you wish to use and then select the “Create” line. (Note: the Context field is not shown in FranklinCovey mode.)

Actions

Pocket Informant supports several action types that you can use for managing your Tasks. Pocket Informant attaches special importance to Next Actions, which, in a Project, cause a Task to move to the top of the ordered list, if selected. If a Task is the current Next Action and you change it to any other action type, then it is moved to the bottom of the ordered list.

Task Alarms

Pocket Informant allows you to set an alarm for a Task.

Dates

Pocket Informant allows you to set optional start or due dates for a Task.

Start/Due Time

A start or due time can be set on tasks with a due date. These tasks will be marked as overdue after the specific due time.

Recurring/Regenerating

Recurrences do not show up in the editor until you have added a due date to the Task. The recurrence rule you set can be applied to the "completion date" of a Task, or to the "assigned due date." For example, if you set a Task to recur weekly on the completion date, when you mark the Task as Completed, the next Task will be due a week from the date you mark it Completed. Alternatively, if it's set to recur from the assigned due date, the new Task will be due a week from when the last Task was due (regardless of when you actually completed it). All recurrence options listed in the "Recurring Events" section are available for recurring Tasks as well.

Parent Task

A task can be a sub-task to other tasks. This lets you choose the parent of the existing task.

Child Task

As long as the task has no parents you can add child tasks to a task you are editing or creating. Here you can pick existing tasks to be sub-tasks or create a new task based on the task you are editing/creating.
**Sub-Tasks (Overview)**

Pocket Informant supports a basic set of sub-task features. Subtasks are denoted by a icon in the Task lists. They are also shown indented under the parent task in the Tasks View with the following limitations:

- **Must be in the Tasks View.** Subtasks are not shown indented in *Today View*, or any of the Calendar Views at this time. We are planning on implementing that in a future release.

- The parent task must be showing in the same group as the child task. If you are using a Grouping where the parent and child tasks are in different groups, indentation will not occur.

- Indentation does not occur in *GTD Project view* (but does in *Franklin Covey Project view*) because *Project View* is user-sorted and as such the user can move the tasks in any order which would conflict with the sub-task display.

- Indentation does not occur in the *Completed view*.

Sub-tasks will sync with Toodledo Pro users, but not, iCal, Outlook or non-Pro Toodledo users.
**Contacts View**

The new Contacts View integrates the iOS contacts database into Pocket Informant. From this view in the portrait orientation you scroll in an up and down motion through your contacts database. Rotating your device to the landscape orientation will allow you to see your contacts with photos in a number of different presentations. The presentation is an option that is determined in the settings of the Contacts View. It is important to note that when in the landscape orientation contacts that do not have photos will not be visible.

In the Contacts View any contact can be added, edited, deleted, called or emailed without having to first exit Pocket Informant.
Notes View

In the notes view you can create notes by typing them in or you can record voice notes. Notes can be sorted by tags or folders for easy sorting. You can add tags or folders as needed.

To create a text note press the + button in the top right of the view. To set items such as tags and folders scroll up to bring those fields into view. When your note is complete press the done button to save it.

To create a voice note, tap the voice notes filter then tap the microphone button in the top right of the view. Then record your note. When finished press the save button to stop recording and to save. The note will be saved with the title set as the date and time it was recorded. The play button on the left side of the note name will playback the note. The button on the right side when tapped will display the voice note information. Here you can change the name of the note and add a text note if needed.

Tapping the envelope in the top right of the view will allow you to directly email the voice note directly from PI.

The notes are then filtered, it is important to note here that All Notes and Todays Notes only refer to your voice notes and notes created in the Notes View. Notes are a standalone feature and should not be confused with the comments on events and tasks.

Tapping one of the filters will allow you to see the notes contained in that filter. Tap a text note to view its details then tap the Edit button to begin editing the note. When done editing tap the Done button to save the changes.

The (3 bar) button on the far right of the text notes allows you to delete multiple text notes at the same time. To select multiple text notes, tap the far right button for each note that you want to delete then press the appropriate action button to complete.

Voice Notes can have some of their attributes edited. Tap the right side blue and white arrow to show the notes attributes. The title can be edited from this view. Also a text note can be added to the voice note. This note would be used in a similar fashion to writing info about a recording on a CD.
Notes can be grouped by dates, titles, tags, or folders/projects in the various views by tapping the desired sort button at the top of the view.

Filtering is also available by tapping the filter button in the top left of the main notes view. The filtering can be set to filter the notes by their calendar view or their tags. Voice Notes cannot be filtered at this time.

All of the views in the Notes area have grouping options available to make it easy to find specific notes.

Text notes can be synced with ToodleDo or Outlook via WDS sync.
**Search View**

The Search View is a powerful tool within Pocket Informant that allows you to search for items such as Contacts, Tasks, and Events by simply typing in a characteristic or element such as a first name or an Event name. All items that match the search criteria will be displayed below the search bar in various sections. As with any other list view, all controls are available in the search view to mark Tasks as complete, edit Event details, etc. The Search View has been enhanced with it’s own “mini filter” so to speak. Now when searching for something, simply tap the search window to bring up a selection of filter buttons. Enter your search criteria then select the filter button of your choice which will narrow down the scope of your results. The four buttons are “All”, “Events”, “Tasks”, and “Contacts”. At this time the Search View does not include Notes.

**Grouping, Search/QuickInsert/Add**

Many of the screens in the Pocket Informant Task View and Notes View have a three button bar on the top right which provides very powerful functionality. The three functions are Grouping, Search/QuickInsert/Add.

- **Grouping**
  Grouping allows you to both group and sort a list of tasks by Date, Progress, Completion, and more.

- **Search/QuickInsert**
  This all-in-one field searches the list of tasks quickly and allows you to insert the item quickly without the need to open a dialog.

- **Add**
  This is the traditional Add content dialog.
Templates

Templates are a way to create preset events or tasks that you can apply to events or tasks while editing. You can create templates by tapping on the action button of a task and selecting “make template”. Or any event from the detail screen by pressing the template button or by visiting the Settings->General->Manage Templates screen.

Event Templates

Event templates are like a pre filled in form for events. You can set the time, calendar, alarms and several other event attributes in the template and when you apply that template those pre selected attributes will be used in the event.

All Day Events are treated specially by letting you choose a duration of the all day event which is then applied when you choose that template.

New in Pocket Informant 2.0 is the added ability to attach photo’s and contacts to a template.

Task Templates

Task templates are likewise like regular tasks except that you don’t set the dates of the templates. Instead you are given a choice of how far out the due date is automatically set past the current date which is then applied when you pick that template.

Applying Templates

In the event or task editor you will see a new button to the right of the title field which when tapped on brings up the template picker. Select the template and it will be applied.

New in Pocket Informant 2.0 is the ability to create child tasks from within the template or to select an existing task to be a child. When creating new child tasks in the template, those child tasks will be created as tasks each time the template is used.
Calendar/Tag Filtering
Each event, note or task in Pocket Informant resides on a Calendar. Each Calendar can have a color associated with it. With the filter icon in the top left corner of each view you can filter your data to only show the events, notes and tasks on the Calendars you want to look at. Or you can choose to filter by the tags that you have assigned to tasks, events and notes. The filtering options are quite flexible: You can choose any combination of calendars to display at once and you can choose whether this filter applies only to Events or also to Tasks.

When filtering you have two ways to set the active filter:

- Tap each calendar you wish to display (a check mark indicates that calendar will be displayed) and then tap Save.
- Press the colored Calendar circle on the left side of the calendar cell - this will select just this single calendar to filter by and immediately perform the filter.

If you would like to view all your Tasks (meaning the filter should not apply to Tasks), make sure the "All Tasks" segment is selected. If you would like the filter you are creating to also apply to your Tasks, choose the "Filter Tasks" option.
Alarms
Alarms can have a sound associated to them that you configure and when they arrive you can view the item the alarm is for. Tasks and events can have their own sounds meaning one alarm sound can be set for your tasks while a different sound can be set for event alarms allowing you to easily distinguish which alarm may be sounding. The default sounds for each is set in the settings area for tasks and calendars respectively.

Alarm Limitations
Alarms are a great feature however alarms are limited to 64 alarms per application on iOS 4.0 and up. and Pocket Informant still must schedule each alarm going forward. For this to happen Pocket Informant has to run every so often to create these alarms. This will usually happen every so often naturally, but you may still find a need to launch Pocket Informant at least once every few days to ensure these alarms get created. Because of the 64 alarm limit if you have multiple alarms per event and task alarms, you may find that Pocket Informant has only created 2-3 days worth of alarms. Opening Pocket Informant up at least once a day will ensure that the alarms continue to get regenerated. This is not a hard and fast rule as if you use fewer alarms you can go farther between opening Pocket Informant.

Snoozing All Alarms
This is not yet available but will be in a future release.

Alarms from Synced data
Pocket Informant will create Alarms for data synchronized down immediately after the sync is complete. To confirm that the alarm has been created, look for the alarm "bell" icon next to the event.
Synchronization
During synchronization operations Pocket Informant has a Wi-Fi indicator that will show on the screen while the sync operation is in progress, provided that the device is connected via Wi-Fi. If the Wi-Fi symbol is absent during a sync operation the device is not connected via Wi-Fi. This is especially handy when doing a WDS sync as it requires a Wi-Fi connection.

In Pocket Informant 2.0 it is possible to now sync notes. Notes can be synced with ToodleDo or with Outlook via WDS syncing. In the ToodleDo sync configuration the slider for notes support simply needs to moved to the “on” position. In WDS the notes sync to Outlook is automatic.

Occasionally, due to the variables in all sync processes it may be necessary to do a “Reset Sync”. Regardless of the sync method the reset options are the same and are outlined below.

**Erase Local Data**-This will erase all of the local data in PI that is assigned to the sync account. It will download all of the information from the sync source. Using this method ensures that the data coming into Pocket Informant will mirror that from the sync source. Any data in Pocket Informant that was not synced prior to this operation will be lost. Using this method it is highly unlikely that your data would be duplicated.

**Merge Local and Server**-This option will erase synced data in Pocket Informant that is assigned to this sync account. It will keep the un-synced data. It will then download all of the data from the sync source.

**Upload All Data as New**-This option takes all of the data in Pocket Informant and marks it as un-synced. It then uploads all of it to the sync partner. It is imperative to make sure that your sync partner is “clean” meaning that all of the data is out of it otherwise duplicated data could be the result.
**Desktop Outlook (Windows Only)**

Pocket Informant can sync with Outlook for Windows. Additionally Pocket Informant still has the same capabilities to sync with Google Calendar and Toodledo for tasks.

To access and set up your “Sync Settings”, simply press the settings button at the bottom right of the main Pocket Informant screen. From there tap Sync Settings.

Press the plus sign to add the sync method of choice. Desktop sync is the one that will sync with Outlook. Once your desired method is chosen you will be taken to the area to configure that sync method. The questions are self explanatory and allow you to determine things such as how often to sync, what content to sync, what calendars to sync and so forth. These are simple off/on toggles. We encourage you to experiment with different settings to find out which configuration you like better.

The “Pair With Desktop”, button is part of the sync settings that allows you to build the relationship to your desktop. This can be done manually or automatically. Once this relationship is established you should not need to make any changes here. If Pocket Informant cannot automatically find a computer to pair with you will need to tap the manual button and configure the connection yourself. Please note here that all network configurations are unique and while we will do our best to assist you, your network admin can also be a valuable resource during this initial connection. **It is very important** to view the sister document to this one available on at [http://webis.net/support](http://webis.net/support). This document will explain the details of Windows Desktop Sync (WDS), it will also provide information on downloading and installing the required desktop client that allows WDS to function.

Some very important notes to keep in mind when using this sync method are as follows;

When iTunes updates come out, you must exit (shut down) the WDS client before installation of the iTunes update. iTunes carries with it a key component of the WDS sync system called Bonjour. If Bonjour is active (running) with the WDS client during the upgrade you will lose the ability to sync after iTunes upgrades. Turning off the WDS client during this upgrade will ensure that you avoid this issue.

When upgrading the WDS client it is best to uninstall the existing client. This gives the new client a “clean” starting point.
Due to all of the variables inherent to everyones personal and business Wi-Fi networks you may have to try different settings to find a WDS configuration that works well for you. Be patient and please contact our technical support if you get stuck. Once this is properly configured unless something changes in the network configuration you should not have to worry about it again and it should work reliably for you.

As of this writing, the sync option of syncing Outlook to iCloud and iCloud to the iOS calendar on your device is not a direct replacement for the WDS sync. There are several reasons for this. First is that the native calendar support that Pocket Informant has doesn’t support tasks, this is a developmental limitation that we are working to overcome. Second is that the the use of WDS allows users to take advantage of more of the robust features that Pocket Informant offers for both events, notes and task syncing.

**Google Calendar/Toodledo Sync/Google Tasks**

Google Calendar/Tasks and Toodledo sync in a similar fashion. First you will need to have an existing account with these services if you want to sync with them. To get PocketInformant to sync with either of these services start at the Sync Settings under the Options button from the main Pocket Informant screen. Then press the plus button and choose the service you want to configure. The service configuration is a straightforward and simple process. Simply set the options to your preferences. Enter the login information for your account so that PocketInformant will have access to it. That’s it Pocket Informant should now by synced. You can set pocketInformant up to sync multiple calendars.

It is important to note here that ToodleDo Pro is required for accurate and correct syncing of subtasks.

In the Google Calendar sync there is an option to “Save Meta Data In Notes Field”, this feature when enabled will move Pocket Informant supported items such as tags to the notes field of the event in Google as those types of features are not directly supported in Google Calendar.
Certain recurrence patterns can cause a slight differential between Pocket Informant and Google calendar. Outlined below is how this instance works;

Say you create a recurring event starting on Jan 16, 2010. Set the event to repeat the 4th Sunday of every month. In Google you’ll see two instances of the event - one on the 16th where the event pattern starts, then one on the 23 (the 4th Sunday). Pocket Informant will only show the one on the 16th, then it skips to the next month (4th Sunday) because it assumes it already did the event for the current month.

In nutshell if you build a recurrence pattern where the first occurrence of the pattern takes place before the actual pattern starts like the example stated above, Pocket Informant will only show one occurrence for the pattern in a given time frame (as in one month for example given). Whereas Google will show the starting occurrence and the first rotation of that occurrence pattern even if it is within the same time frame.

Sync is a continually evolving and improving process, we will be posting more information and announcements on our website http://pocketinformant.com.

To create a sync partnership for Google Calendar/Task or ToodieDo go to Settings, Sync Settings, and tap the (+) sign in the top right corner. Select the sync partnership you want to use. From here you will be prompted to enter login information for the service you want to use as well as the parameters for the sync. For Google sync accounts the login process is now a two step process. After the sign in, you will need to tap the “Allow” button for the sync to be enabled.

Once the sync is set up press the first time sync button to immediately initiate a sync.

New in Pocket Informant 2.0 is the ability to sync events via multiple Google Calendar accounts. Following the setup instructions above you will be able to go back to “Add Account” portion of the sync settings and repeatedly add different Google Calendars.

Also available is the ability to sync tasks via Google. It is important to note here that while multiple Google Calendar accounts can be supported for simultaneous sync of events that, at this time, only one Google Account can be selected to sync tasks.
The process to set up a Google Task sync is the same as that of the Google Calendar.

Sync Limitations

There are some limitation to the sync services offered in Pocket Informant.

Some sync services cannot work with each other, for example syncing Pocket Informant tasks with ToodleDo and Google tasks is not possible. Syncing Pocket Informant via WDS and Google Calendar(s) isn't possible either. In our testing these and other combinations did not work reliably or with satisfactory results. Pocket Informant keeps track of the sync methods in use and will gray out methods not available when you tap the Add Sync Services Button.

Task support with the WDS sync method and ToodleDo are reasonably robust in their support of the task attributes that are available in Pocket Informant. Google Tasks at this time are not so much so. All of the basic information will sync, however Pocket Informant task attributes that are not supported by Google Tasks will remain visible on your device unless a reset sync with Google Tasks occurs. If that happens the tasks shown in Pocket Informant that are synced with Google Tasks will lose their PI attributes and will only show the information supported by Google Tasks.

**Automatic Sync**

Pocket Informant will automatically sync based on the settings chosen by the user:

- Pocket Informant will automatically perform an immediate one-way background sync of changed items as you use Pocket Informant.
  - This feature is smart enough to deal with changes that happen in quick succession
- Automatic Sync will also perform a full two-way sync every user-defined number of minutes (if Pocket Informant is not running after the user-defined interval of minutes from your last sync, it will automatically sync on your next launch)

You can set the time interval of the full sync in the Sync Settings screen.

It is important to note that while Pocket Informant will run in the background (on supported devices) it will not sync until it is the opened or main application.
Calendars to Sync

When you setup the synchronization, you can choose which Calendars to sync with. Both your Calendars and Shared Calendars will show in this list. Once a Calendar is synched, it will not be deleted if you remove it from the sync list. This is useful when syncing unchanging public calendars such as Holidays. To remove a Calendar from Pocket Informant, visit the Create/Edit Calendars screen in Settings to remove it. It is important to note here that Google Sync now has an enforced rule of once a day syncing of calendars that are ICS imported and a once a week sync for holiday calendars. This greatly speeds up the sync process.

Shared Calendars take substantially longer to sync than your own Calendars because Google’s servers take longer to respond for Shared Calendars.

Calendars to Sync affects what gets synced

Calendars to Sync is also very important because this is what identifies to Pocket Informant what gets synched to what account. For example you may have multiple Google accounts you sync to and each event can only be synched to one account. To facilitate this we use the calendar that the event lives on to identify what account that event syncs to.

Task Syncing

To sync your Tasks, there are three options. Toodledo is an online service that provides a great web interface as well as syncing service.

When using GTD or Franklin Covey mode, Pocket Informant maps Toodledo fields in the following manner:

- Toodledo Folders are mapped to Pocket Informant Projects.
- Toodledo Tags are mapped to Pocket Informant Calendars. Any Task with a blank tag in Toodledo is assigned to the Default Calendar when syncing down to Pocket Informant. Similarly, any Tasks in the Default Calendar of Pocket Informant are assigned no tags when syncing up to Toodledo.

Google Tasks is another option for task syncing. This is a basic task sync that allow you to access the task list from the Google Calendar web interface. Tasks created and synched using this method do not support the full battery of task options offered by Pocket Informant. However
for Google Calendar users this is a quick and convenient method to manage their events and
tasks in one location.

WDS syncing to Outlook is another method of task management offered by Pocket Informant.
Users of this method can use Outlook to manage and sync tasks to Pocket Informant. This
provides a convenient method to manage events and tasks also in one location. Task support in
Outlook is robust and very similar to task support in Pocket Informant.

Native iOS Calendar Access
It is important to understand what this is and what it is not. It is not sync but instead a direct
reading of the existing calendars and events that live on your device. It also has nothing to do
with task support because the iPhone calendar itself has no native task support.

You may find that if you sync your iPhone to the same calendar data set as Pocket Informant
through Google that when you turn on native iOS calendar access your calendar looks like it
is duplicated. In a strict sense this is not true. Because this access is not sync Pocket
Informant is now reading both its own calendar data as well as the native calendar data on
device so it will show data in both sets. They do not intermingle, however. It is strongly
recommended that you do not sync the same data to PI and the native iOS calendar
simultaneously as you are creating a sync loop which can create duplicates and cause
battery drain.

One of the benefits of native calendar access is that anything that syncs events to the built in
calendar in your iOS device will now be visible in Pocket Informant. Events generated within
Pocket Informant using these native iOS calendars will also be visible back the other
direction and will show on the native calendar and the sync partners of the local calendar.

A few limitations exist in native iOS event access:

- Events before 1933 are not supported, either through Birthday support or trying to
  create the events (this may be fixed in a future iOS release). Events such as
  birthdays before 1933 will show up on December 13th or 14th of the year you are
  looking at.
• Meeting attendees are not supported.
• Calendar editing or deletion is not supported.
• Alarms for native events will bring up the native calendar, not Pocket Informant.
• Data changes/updates require global refresh of all native event data and as such you may experience slow or global refreshes in the interface as you interact with the native events.
• Any Pocket Informant specific fields such as icon and tags are not supported for iOS calendar events.
• Event time zones are not supported

It is important to understand that these limitations are not ones we can work around but are intrinsinc to the iOS interfaces that we’re using to access the calendars. As Apple improves these interfaces, so will our support of them.

It is also important to understand that we are not synching data but reading the data directly. With that said it is equally important to understand that Pocket Informant does not become a bridge between the iOS calendars and Google. Syncing with Google does not mean that your iOS calendar items will show up there. iOS calendar support and Google sync are totally separate items as are the events contained within each of them.

## Migrating Existing Calendar Data to Google Calendar

### If you are using iCloud

There are a few options for migrating, copying, or syncing data from iCloud to Google Calendar. The best way is to use third-party commercial software such as SpanningSync or BusySync to publish your iCal calendars as Google Calendars. There is also a free option called Calgoo that is recommended by some, but has not been tested by WebIS.

Make sure that your iPhone and Mac use MobileMe to sync your calendar data and set up Pocket Informant to sync with Google Calendar, and you will be all set.

### If you are using Outlook on Windows

1. Download Google Sync for Windows
2. Set up Sync so that it syncs up to Google
3. Set up your Sync settings in Google Calendar’s settings

### For over-the-air Google Exchange Sync

1. Set up your iPhone to sync with your Google Calendar using Google Sync for iPhone
**For USB iTunes Sync**

1. You’re done! iTunes will sync your Outlook data to the built-in iPhone calendar and the Google Outlook Sync will sync your Outlook data to Google Calendar.

**If you are using iCal on the Mac without iCloud**

There are multiple ways to get your calendar data to Google Calendar:

1. Purchase third-party software such as [SpanningSync](https://www.spanningsync.com) or [BusySync](https://www.busysync.com).
   - This is the easiest solution; however, it is an extra cost. You could use the trial versions of these packages task the initial import/export.

2. There is a free option called [Calgoo](https://www.calgoo.com) that is recommended by some, but has not been tested by WebIS.

3. Free method:
   - Export your iCal calendars one by one to your desktop.
   - Go into Google Calendar and create each calendar.
   - Import the data from your iCal Exports.
   - Use the [Google Collaborator](https://support.google.com/calendar/answer/9000434?hl=en) application to have iCal directly sync to your Google Calendars via CalDAV.
Settings View
The Settings View allows you to see and set all of the options in Pocket Informant. One of the great features of Pocket Informant is the flexibility it affords you to configure it to what fits you the best.

Users are encouraged to try out the different settings to see just how flexible Pocket Informant is and to find a custom fit that maximizes all that Pocket Informant has to offer. The settings are divided into six categories listed below:

First - note an important button at the top of the screen:

Help
We have included some basic synchronization help within Pocket Informant, as well as a direct link to our knowledge base.
**General Settings**

**Application Badge**
Pocket Informant can be set to use a standard iPhone icon badge. This badge can be customized to show counts of overdue Tasks, today’s Events, Next Actions, etc.

**Owner Info**
This information in here is used for sending out Meeting Invites. There is also a place you can fill out registration info that will help WebIS know what products our customers might be good solutions for us to partner with.

**Password**
It is now possible to secure access to Pocket informant with a password. A 4 digit password can be entered. Users can also set when the password will be required. To remove a password simply go back to the password settings and tap the trash can icon in the top right of the view. This will remove the password from Pocket Informant.

**Manage Calendars**
In this area of the settings you can set up various Calendars and choose color representations for each. These settings will affect how Events show in the various Calendar Views. The default Calendar is clearly indicated in the listings. This means that unless otherwise specified, an Event will default to this Calendar. The default Calendar can be renamed and re-colored if you choose, but it cannot be deleted until you make a different Calendar the default. More Calendars can be added by pressing the **Add (+)** button in the upper right of the Navigation Bar. Tapping an existing Calendar will bring up the color palette and offer the option to rename the Calendar. To delete a Calendar, swipe to the right and press **Delete**. Calendars can have icons and specific time zones added to their attributes in 2.0.

**Manage Tags**
Pocket Informant tags and tag colors are managed here. Tags can be added by pressing the + plus button or removed by doing a “delete” swipe over the tag. Existing tags can be edited here by simply tapping on them, you will be taken to the edit screen. This is the same screen you will see when adding new tags.

**Manage Templates**
Pocket Informant templates are managed here allowing you to create and edit templates.
**TimeZone Support**
Here you can set global (entire application) time zone preferences. The default setting is automatic meaning that the device timezone information will be used by Pocket Informant. However should you have the desire or need, by tapping this selection, you can set PocketInformant to any timezone you desire or need.

**TextExpander Touch Snippets**
Please see page six of this user guide for detailed information on TextExpander Touch. This is a simple toggle to turn on or off the TextExpander Touch feature.

**Appearance**

**Max Title Display**
This setting allows users to determine how many lines are displayed in the event or task title. There are multiple choices, ranging from all lines to a single line. The default is one line.

**Title Font Size**
This setting determines how large the font is in the title lines of events and tasks. The choices are small, medium and large, with medium being the default. It is important to note here that the smaller the font size the more text will be visible in the various views.

**Month Cell Font Size**
This setting determines how large the fonts look in the Month View cells. The larger the font the less information can be displayed.

**Past Appointment Style (Events)**
This setting allows users who have need to differentiate past appointments and completed tasks with a different look to do so. There are 4 choices, None, italics, Small Text and Faded. Whichever setting is chosen will determine how past appointments and completed tasks will look throughout the views.

**Color Display (Events)**
This is another flexible visual aid that can help users, at a glance, identify events quickly and easily throughout the calendar views of Pocket Informant. This setting determines how the user will see the items, they can either appear with the cell colored, the text colored, or no coloring. The coloring will be determined by either the tag or the calendar that the item is applied to.
Use Tag Colors (Events)
Tag colors help users identify an item by relating it to an activity such as work, family, etc. When enabled The tag color shows on the item layered over the calendar color.

Use Tentative Color (Events)
This setting enables a color that comes from Google Calendar for tentative items synced down. This setting works for some Google calendar users but not for all. We have not been able to isolate when or when not this option comes into play. For our users who do see this option work sliding this to the on position will allow you to see that color from Google in PI.

Today (Events)
This setting determines the color that will be displayed when the current day is displayed in the calendar views.

Color Display (Tasks)
This option operates identically to the color display setting for events. Colors are a visual aid that can help users, at a glance, identify events quickly and easily throughout the task views of Pocket Informant. This setting determines how the user will see the items, they can either appear with the cell colored, the text colored, or no coloring. The coloring will be determined by either the tag or the calendar that the item is applied to.

Use Tag Colors (Tasks)
Again the use of tags in tasks is identical to that used in events. Tag colors help users identify an item by relating it to an activity such as work, family, etc. When enabled The tag color shows on the item layered over the calendar color.

Overdue (Tasks)
This is the area where the color for overdue tasks is set. If you need a “red alert” so to speak when a task goes overdue or of you want something a little more subdued, this can be determined and set here. In the various task views this is the color set for any tasks that are overdue.

Priorities (Tasks)
Pocket Informant has many different priorities that can be applied to tasks. In these settings you can select the display color for all of the priorities and the text for each of these same priorities.

Carousel Mode
In the contacts view, when in the landscape orientation, this setting will determine how contacts with photos will be displayed. The choices are Flat which is a simple left and right swipe of the photos. Cylinder adds the effect of the photos being on a round cylinder as they are displayed. Flow is a smooth left and right view. Flip is like the landscape view in the music player. Each contact flips into and out of view.
Reset Appearance
This button will restore all appearance settings back to the factory defaults.

Today Settings
In this view, you can enable or disable the following sections from appearing in the Today view: Next Actions, Tasks Completed, Alarms, Attendees In Progress Tasks, Tasks Starting, and Starred Tasks.

Calendar Settings

Manage Calendars
In this area of the settings you can set up various Calendars and choose color representations for each. These settings will affect how Events show in the various Calendar Views. The default Calendar is clearly indicated in the listings. This means that unless otherwise specified, an Event will default to this Calendar. The default Calendar can be renamed and re-colored if you choose, but it cannot be deleted until you make a different Calendar the default. More Calendars can be added by pressing the Add (+) button in the upper right of the Navigation Bar. Tapping an existing Calendar will bring up the color palette and offer the option to rename the Calendar. To delete a Calendar, swipe to the right and press Delete. Calendars can have icons and specific time zones added to their attributes in 2.0.

iOS Events
Pocket Informant supports the native iOS or built in calendars on your iDevice. See native calendar support elsewhere in this manual for further information on this feature. There is also detailed information in the application itself regarding this setting.

iOS Events Settings
Think of this area as a “Manage Calendars” section for iOS calendars. Here you can decide what iOS calendars will be visible and therefore useable in Pocket Informant.
ISO Week Numbers
This turns on the display of the ISO 8601 week numbers on the day titles within the Calendar Week View.

Default Calendar Alarm
This setting allows you to automatically attach an alarm to any new events that you create.

Work Hours
This is where you can define the hours of the work day by selecting start and stop times. This setting is used to shade work hours in Day View and the time-bars in Week View.

New Event Duration
This setting lets you determine the default duration of new Events that you create.

Alarm Notification Sound
This is the area where you can set the default alarm sound for events.

List Shows Empty Days (View Specific Settings)
When enabled this will include empty days in the list views so that you can easily identify them.

Week Setup (View Specific Settings)
Here you can customize how Pocket Informant displays the weeks. The default view is 7 days however a 7 day split can be selected, offering a split view of the week as well as a new Weekday option which will show Monday through Friday.

Month Cell Style (View Specific Settings)
You can determine how the days will appear in the Month View. There are five different choices as follows; Number Only, Time Bar, Mini-Text, Mini-Text (including time), Mini-Text w/Colored Background.

• Number Only-Will display only the number of the day in the Month View.
• Time Bar-Will show the time bar in the day when in the Month View.
• Mini-Text-Will show a portion of the description in the day.
• Mini-Text (including time)-Shows the same as Mini-Text but adds time to the display.
• Mini-Text w/Colored Background-This setting will display the event info with a colored background. The background color will be that of the calendar that the event is attached to.

Week View Time Bars (View Specific Settings)
This setting will toggle the time bars on or off in the week view.
**Week View (First Day Of Week)**
This setting will determine when in the week view what day will be displayed at the top of the view. The default setting is the current day.

**Month View (First Day Of Week)**
This setting will determine what day shows as the beginning of the week in the month view. The default is Sunday.

**List (Tasks in Calendar View)**
If enabled this setting will show tasks in the list view.

**Day (Tasks in Calendar View)**
New in Pocket Informant 2.0, if enabled this setting will show tasks in the day view.

**Week (Tasks in Calendar View)**
This setting will enable tasks to show in the week view.

**Month Cells (Tasks in Calendar View)**
When enabled this setting will show the tasks in the month view cells.

**Method (Types of Tasks To Show)**
This setting determines what kinds of tasks are displayed in the calendar views. The choices are Due and Overdue or in progress.

**Show Overdue Today (Types of Tasks To Show)**
With this setting enabled the overdue tasks will show in the calendar views.

**Show Completed (Types of Tasks To Show)**
This setting will display the completed tasks in the calendar views if enabled.
**Task Settings**

**Task Mode**
In this part of the settings you can determine which methodology will be used for the Task list; ToodleDo, FranklinCovey or GTD are the available options.

**Editor Features**
New to Pocket Informant 2.0 you can determine what fields are available for view in the task editor. This allows you to remove from view fields that you never use. The sliders are simple on off choices for all but the mandatory fields needed in task creation.

**Alarm Notification Sound**
This setting is where the default alarm sound for tasks is set.

**Task Tab Badge**
The To Do button at the bottom of the Pocket Informant screen will show a red badge, this setting determines what is indicated by that red badge. The setting None deactivates the badge feature. Selecting Overdue Count will show the number of overdue Tasks. Choosing Due Today Count will display the number of items due today. And selecting Both will show a red badge that has a combined number comprised of overdue items and items due today.

**Context Location**
This feature in Pocket Informant when enabled allows you to add addresses to your task contexts. When you are near that address, Pocket Informant will alert you to the fact that you have a task corresponding to your current location. For example you can set a context called “Shopping” and put in the address of the store. You can then create a task for shopping. When you are out and about during your day, if you are near the store, Pocket Informant will alert you to this fact and show you the task associated with it. To add an address to an existing contact open to the contexts manager, in the Task View, turn on Location Alarms with the slider and tap the edit button. This will make all of the contexts editable. Tap the context that you want to add an address to, tap the mapping symbol next to the context name. Enter the information such as store name or as much of the address as you have. The map view will then move as close as it can to the desired address based on the information entered. You can move the push pin on the
map to the desired location then select the option to use this location. Now there is a physical address associated with this context.

**Show Project Stats**
In the task view when in GTD mode, tapping into a project shows a dashboard. This dashboard shows the stats of the project. If you do not wish to see this but only want to see the project content simply move this slider to the off position and the dashboard will not be visible.

**Show Completed**
In this area you will be able to determine what if any of your completed tasks will continue to show. Simply move the slider to the “On” position for any of the filters. Then those completed tasks will always be shown.

**Manage Smart Groups**
Smart Groups are a powerful new feature in Pocket Informant 2.0. In the “Tasks” section of this user guide they are discussed in detail. This menu selection takes you to the full Smart Groups editor where Smart Groups can be created, edited or deleted. In summary, think of Smart Groups as user defined filters for tasks.

**Start Date (Defaults)**
When this is on, Pocket Informant will automatically set a Start Date of “today” on all new Tasks that you create.

**Due Date (Defaults)**
This feature when enabled will determine the default due date for new tasks. The default selection is “Today”.

**Default Task Importance**
You can set the default Task importance here. This is what Pocket Informant will use when setting up a Task if no importance setting is selected when adding an item.
Sync
Pocket Informant comes ready to sync with Outlook, Google Calendar and/or Toodledo. This setting is where the sync method(s) are chosen. The settings below are assuming that the sync method has already been built by the user in Pocket Informant. For more detailed information please see the “Synchronizing” elsewhere in this user guide.

Desktop Sync
To enable the desktop syncing with Outlook for Windows, simply turn this switch to On. To disable desktop syncing simply move the slider to the Off position. Pocket Informant will need to have been previous paired with the PC for sync to operate properly. At this time it is not recommended to set desktop syncing to automatic unless you will be using your device exclusively on the same network as the paired PC at all times. Also it is not advised to use Google Sync and Desktop Sync at the same time. Check this doc/link (Please see the WDS Sync document at http://webis.net for detailed information on configuration and use of the Outlook sync feature.

Google Calendar/Tasks
To enable syncing with Google Calendar/Tasks, simply turn this switch to On. To disable syncing with Google Calendar, simply move the slider to the Off position. Pocket Informant 2.0 supports syncing with multiple Google Calendars but at this time only supports Google Task sync with one Google account.

Toodledo
To enable syncing with Toodledo, simply turn this switch to On. To disable syncing with Toodledo, simply move the slider to the Off position.

Shake to Sync
When this is on, you can give your iPhone a shake to do a full 2 way sync between Desktop, Google and Toodledo.

AutoSync
Pocket Informant automatically syncs up any changes made within Pocket Informant immediately, but it also checks the server for any changes to sync down. This option lets you pick the time interval that the full server sync is performed.
For more detailed and specific information on syncing operations, please see the “Sync” section of this guide.

**Advanced**

The Advanced area of the settings is for more complicated Pocket Informant settings. The backup system settings reside here, as well as version information, and logging. The version information is very important when working with Support to resolve any issues that may arise.

**Backup/Restore**

Pocket Informant makes automatic backups of its database. These backups can be restored at any time by simply selecting the one you want to use and then choosing the appropriate action button from the menu at the bottom of the screen. You can also make an immediate backup by simply tapping the “Backup Now” button. Pocket Informant also has a built-in web server that will allow you to backup and restore files and access the sync log if necessary to fix a syncing issue or to match a crash log during sync. Simply turn it on and visit the IP or Bonjour address from any web browser on the same WIFI network as your iPhone / Ipod Touch/iPad to download or upload files. Pocket Informant manages its backups, it makes them periodically and always before a reset sync operation or an erase local data option. You can also manually have Pocket informant make a back up for you.

**Database Management**

In this section, if needed you can completely erase the Pocket Informant database and essentially start over. This would let you start from scratch, for example, and let you sync down all your information from Google and Toodledo again. NOTE: This option will erase all local data (Events and Tasks). Before erasing your data, Pocket Information will automatically make a backup of your database which you can retrieve using the above Backup/Restore option.

Within this section you can also reset your alarms. This will cause Pocket Informant to remove all alarms and recreate them. This setting is useful if you have an alarm that is misbehaving, meaning that its firing too much or cannot be deleted from an event.

It is very important to note here that with iOS calendar support turned on, erasing the local or Pocket Informant data will have no effect on the iOS calendar items.
The Reset Cache option should be used if you experience unexpected behavior with the application. This will clear the temporary memory that Pocket Informant was using and in a sense refresh it.

**Application Logging**
This enables various levels of logging to allow the support staff of WebIS to help troubleshoot or explain any issues you might encounter while using Pocket Informant. In general, this setting should be left to "None". However, if you contact support, you might be asked to enable some level of logging for a period of time and then email those logs to us for analysis.

**Allow Alarm Notifications For**
This setting determines what items can have alarms attached to them. Events and Tasks, The default settings here are to have events and tasks turned on.

**Auto Crash Report**
WebIS does its best to ensure that we ship a high quality and stable application. However, with vastly different types of data sets and usage patterns, not everything can be caught in controlled testing. If Pocket Informant crashes, keeping this option enabled will automatically generate a crash log and send it to our engineers for analysis. This log does not contain your personal information. It is what is called a "backtrace" that allows us to see what code was running when you crashed and help us to proactively isolate issues so that we can fix them in future updates to Pocket Informant.

**Feedback**
Pocket Informant has been shaped and advanced in great part by feedback from our users. This new feature allows you to provide feedback and suggestions directly from the application. Don’t be afraid to offer us your thoughts, we value all of our customer feedback.

**Version Information**
This is important so that you can verify the exact version and build of Pocket Informant that is being used. This is especially important information for any interaction that you may have with Technical Support. Also by tapping on the version information you can bring up the Pocket Informant tutorial video at any time.

**Known Issues/Compatibility/Limitations**
Using Pocket Informant brings you into a community of fellow users. There is a good chance that if you are having a difficulty that someone else has come across the identical or very similar situation, there is a also lot of “community” support for the varied ways people are using the
application. Our forums [http://www.pocketinformant.com/Forums/index.php?s=cba2d2409826c2e0af7e353710c493&showforum=60](http://www.pocketinformant.com/Forums/index.php?s=cba2d2409826c2e0af7e353710c493&showforum=60) are a great source of help and general information to help you get the most out of your purchase.

Please look at our list of knowledgebase articles in case you have an issue, before you contact us for support.

**All Day Events Limit**

In a single day Pocket Informant allows a maximum of 20 all day events.

**Day View All Day Events Limit**

In the Day View Pocket Informant can only display 3 all day events. More than 3 all day events will be indicated with a “more” button than can be used to view them.
About WebIS and Pocket Informant

We want to thank you for purchasing Pocket Informant. Behind Pocket Informant stands a team of developers, support specialists, marketing people and many others that strive together to make Pocket Informant the quality product that it is. Founded by Alex Kac in 1997 WebIS has consistently been a class leading producer of various mobile applications. With the advent and proliferation of the iOS and Android platforms Pocket Informant, in its various iterations, has become the main focus of WebIS. Pocket Informant was first produced for use on Windows based PDA’s and eventually SmartPhones. From the Windows Mobile platform to various BlackBerry’s, Androids and iOS devices Pocket Informant has brought with it a high level of sophistication with legendary customization and ease of use that has always set it apart from its competition. The Pocket Informant before you today was and the Pocket Informant of the future will be shaped by your feedback and suggestions. So we thank you for joining us on this journey, for those that have been with us from the Windows Mobile days of 1997 to those who are seeing Pocket Informant for the first time, hang on because it only gets better from here...
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