Informant 4.0

iOS User Guide

Introduction-

A word from our President and Founder Alex Kac.

Hello and thank you for using Informant!

Informant is FREE to download and try out! We know how wonderful Informant is, and you know - but there are millions of potential users out there who just don't even bother. I hearken it to the old shareware scene that we started with in 2000 where you download an app, tried it out, and if you liked it you payed for it.

If you are new to Informant it is an organization application that can be configured for simplicity, to complexity and everything in between.

It is ideal for business professionals with robust features such as being able to simultaneously sync with multiple sources, it can provide ETA information for a task or an event and even alert you if you are near a location that you have a task set up for.

Informant can help the Soccer Mom to keep track of practice, game, and fundraiser schedules, while also providing the ability to make checklists for game day or for the shopping to be done before the team party.

High school and college can be very busy times for students or staff, instead of missing assignment deadlines or missing an important school event or scheduled workday Informant can remember the schedule and even provide project management for those big school projects as well as the ability to record voice notes or write notes in the built in notebook.

Just about any person who is driven by a schedule, a task list or checklist can benefit from the features of Informant.

This user guide is designed to help you become more proficient in the operation of this application. Informant is a very powerful application loaded with hundreds of features to help you better manage your time and get the most out of your day.

In this document we will provide basic step by step instructions for the most commonly used items, we will also explain the new items,and existing features with a balance of details and enough information to get you started. From there Informant is your blank canvas to use any way that you like.

Informant is a tool much like a screwdriver or a flashlight, it can be used many different ways. We cannot cover every conceivable usage case in this writing. The intent of this user guide is to provide you with the basics of the applications operation. A lot of time management benefits are achieved by trial and error with an organization tool such as

Informant. There are many third party resources available that can help you with the theory of organization that you can then adapt and use with Informant.

We have put much thought, information and some personality into this user guide, please take a look and let us know your thoughts and please enjoy the Informant application as it is one of the finest productivity tools available on the iOS platform.

Alex Kac
Found and President
WebIS Inc.

About This Document-

Throughout this user guide you will see **FYI** to indicate an important note or tip. Each section will contain some screenshots. New items will be labeled as NEW.

In previous Informant user guides we found that there was a lot of repetition as we were trying to create a document that covered every button and variation thereof through the application. The result was a user guide that was as engaging as watching paint dry. This user guide while very complete and comprehensive will offer an explanation of how things work but will leave the implementation of the tools up to you and your own creativity.

Before We Get Started iOS Calendars, Reminders and Informant-

Occasionally we like to indulge in a good steak. Sometimes on our steak we will add salt and pepper. They both make the steak more tasty but they are not interchangeable. No matter how hard it tries Pepper cannot be Salt and vice versa. The same idea applies when using the iOS Calendars and iOS Reminders in the Informant application.

In the analogy above Informant is the steak, the iOS Data (events and reminders) is salt and the Informant data is the pepper.

In the Informant application it can use data from two different sources. (You will see this explained again further in the document but since this is a common question we thought we would address it here at the beginning as well.) The two sources are Informants own database and the devices database (iOS data).

The chart on this page will help explain this, it highlights some of the more common differences-

If you open the calendar application that came with your device and the same data that you see in Informant is visible there then you are using the iOS Calendars. If the data in the built in Reminders app matches that of Informant then you are using the iOS Reminders data. Using these data sources in Informant is very common. The key things to remember is that this data belongs to and is synced by the device and only shared with Informant. This data can be viewed with the data that is stored in Informant. Care simply needs to be taken to assign events to the correct calendars so that you get the desired results and the tasks sync to/save to field has to be set correctly to have the desired results for the tasks. If you are creating a task in Informant and you find yourself not being able assign tags, or contexts, etc. check the sync to/save to field. If it shows iOS Reminders that is why those fields are missing. For events if you notice fields missing in the editor please check the calendar field to see if the event is assigned to an iOS calendar.

iOS Calendars vs The Pocket Informant Events

	iOS	PI
Visible In Pocket Informant	X	X
Editable In Pocket Informant	X	X
Add Data In Pocket Informant	X	X
Delete Items In Pocket Informant	X	X
Sync Events To Informant Sync		X
Sync Events To Google Calendar		X
Use Tags		X
Add Attendees		X
Add Icons		X
Add Photo Attachements		X
Add Contacs As Attachements		X
Sync Data to Exchange or iCloud	X	
Data is Backed Up In PI		X
Data is Backed Up to iTunes	X	

iOS Reminders vs The Pocket Informant Tasks

	iOS	PI
Visible In Pocket Informant	X	X
Editable In Pocket Informant	X	X
Add Data In Pocket Informant	X	X
Delete Items In Pocket Informant	X	X
Sync Tasks To Toodledo		X
Sync Tasks To Google Tasks		X
Sync Tasks To Informant Sync		X
Use Tags		X
Use Contexts		X
Use Parent Tasks		X
Use Child Tasks		X
Checklists		X
Action		X
Completion Percentage		X
Add icons		X
Add Photo Attachments		X
Add Contact Attachments		X
Data Is Backed Up In PI		X
Data is Backed Up In iTunes	X	

How To Use This Document-

Reading this document from front to back is probably not the best way to gain value from it. It would likely be like trying to read a phone book. Instead we suggest using it as a reference to get you pointed in the right direction. If you have a question about tasks you can check the table of contents or index for task sections etc. This is a living document and will be updated regularly as time goes by and Informant continues to grow and advance.

Getting Started-

iOS 7 Only/64-bit
Informant is an iOS 7 only app. This was a necessary change to allow the new transition to this demo/free release and to be able to detect prior purchases.

Furthermore we used this to make Informant 64-bit compatible and upgrade all of our code to be iOS 7 only.

FYI Throughout this user guide the only devices referred to will be the iPad and iPhone, if you are an iPod Touch user, the iPhone instructions will apply to your device in every way except when a reference is made to phone calls or actions during a phone call.

Informant is a universal application which means that it will run on all iOS devices that meet the minimum requirements mentioned earlier.

As long as all of your devices share the same iTunes account you can install Informant Premium on them without having to purchase again.

FYI After your initial purchase of the application to install it on other devices that are sharing the same iTunes account please use the steps shown below;

1. Open the app store app on your device
2. Tap the updates tab
3. Tap the purchased banner
4. Scroll through the inventory of applications until you find Informant Pro
5. Tap the application to install it

Once the application is installed go ahead and open it to begin your journey.

After the first time that you install the application you will be greeted by the Set Up Assistant.

The Set Up Assistant is a guide through the basic operations and will provide some basic guidance on how to navigate through the application.

This document is the most comprehensive support document ever written for Informant. The Informant application is a simple application to use yet very powerful in all that it is capable of doing. This makes the creation of a document like this a great challenge. So relax and enjoy this user document. Feel free to let us know how we can improve the document as we welcome all feedback.

Navigation-

The Informant user interface is designed to provide access to as much of your data as possible in the selected view by keeping the buttons to a minimum and the display area to a maximum. In the descriptions below the iPad will be assumed to be in the landscape mode and the iPhone in the portrait mode as that is how Informant is most commonly used on each device. If you are using your iPad in the portrait position with the exception of the position of the view change buttons, all behaviors will mirror that of the iPhone.

The user interface has been designed to be as logical and easy to use as possible.

We will begin with a Informant geography lesson and tour at the very bottom of the iPhone screen and the far right of the iPad screen the **tab bar** located at the bottom of these pages of this user guide will mirror those used by the application.

These buttons control the view that will be shown in the main Informant view. Simply tap the button that corresponds to your desired view to switch to it.

FYI On the iPhone the view control buttons (Tab Bar) can be swiped to the left to show more buttons such as search and settings.
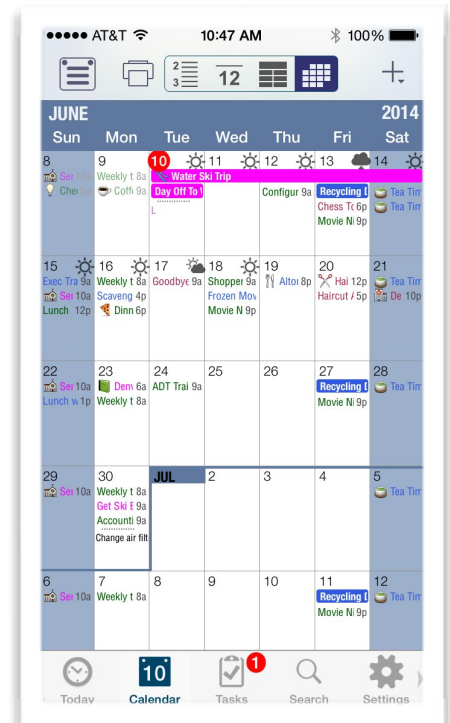
Continuing the tour and moving up from the view controls to the main view screen you will see the data that is in the currently selected view.

NEW In previous versions of Informant on the iPad the calendar screen was split into a left and right plane showing different information. That has been replaced by a full screen single pane view.

NEW On the iPad and the iPhone the Task View contains a "slide out" menu that will present different information depending on what the focus of the main Task View is. Tap the Hamburger Button at the top left of the view to open this slide out and to close it.

Moving to the next phase of the tour at the top of the view are view specific buttons. These buttons change with each main view selected and perform different duties.

NEW Previously the most commonly used buttons were the add buttons to add a task or the button to add an event. These have now been replaced by a single button.

Tapping the add "+" button will open a sub menu and allow you to choose between adding an event, task or note by tapping your selection from the drop down menu.

NEW At the top of each calendar view is a Print Button. Tapping this button will open the printing dialogue and allow you to print a calendar list view from Informant on your device.

Depending on the view that you are in Informant supports a number of different gestures that facilitate data entry and navigation..

Today View Navigation-

In the Today View, the navigation is done with an up and down swipe, to view an items details simply tap on it. We will cover more specifics to this view later in this users guide.

FYI On the iPad the Today View will be displayed with split screen. The left side will be a grid style day view, the right will be the regular Today View

On the iPhone the grid style day view is accessed by tapping the hamburger button. Sliding the grid view back to the left will return to the regular Today View.

Calendar View Navigation-

The Calendar View is divided into four different views. They are as follows; Month View, Week View, Day(s) View and List (agenda) View. Tapping the Calendar View Button will open the Jump To Date menu. The date will be jumped to in the calendar view that is currently displayed.

Month View Navigation-

In the Month View any day can be tapped to view its details. Tapping the Month View button Months can be scrolled using an up or down gesture.

NEW The view no longer locks into a specific month it is now a rolling view. For example you can now view the last two weeks of May and the first two weeks of June on the same screen.

NEW Events that are timed but that span multi-days are now easier to see in the Month View.
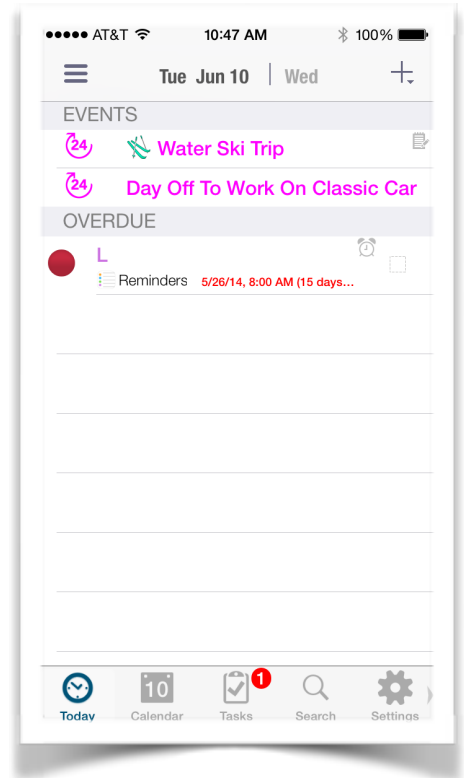
Week View Navigation-

The Week View is next, much like the Month View just tap a day to view it and swipe left and right to change weeks.

==FYI== In the Week View if you rotate your device to the landscape position you can have the Week View change to an hourly grid style view.

Day(s) View Navigation-

The Day(s) View is the next Calendar View option. It is a grid style hourly view. In this view if you tap and hold an item you can drag and drop to a new time. Also the number of days shown can be changed with a pinching in or pinching out gesture. As more days are added the individual display of the days will get skinnier and skinnier and also more difficult to read. You will need to experiment to find the number of days that you prefer to have showing.

Like all other views the data items can be tapped to view their details.
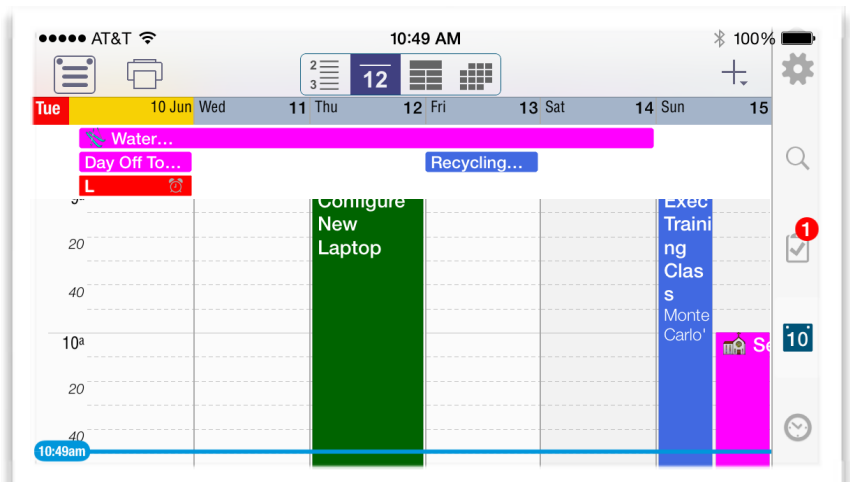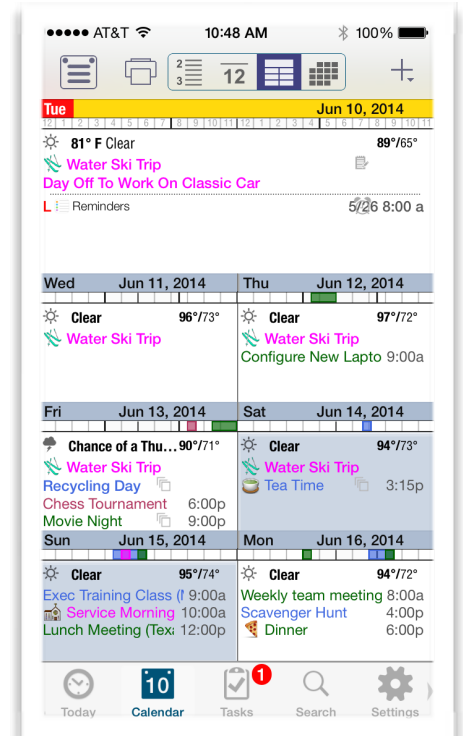
List View Navigation-

The final Calendar View is called the **List View** sometimes this view is referred to as the Agenda View. This view scrolls up and down and "rolls" through the dates. Tapping an item will display its details.

Task View Navigation-

The Task View is the next main view and is probably the most powerful single view in the application.

The slide out is where you will do most of the navigating around the Task View. On the iPad this will be the left side pane. At the top of the view starting at the left side is the "Filter" button which opens and closes the filter dialogue.

Next to the filter button is the "Print" button. Tapping this button will open up the print dialogue.

Continuing to the right (still looking at the fly out) you will see the edit button. Tapping this button will allow editing of the task items in the fly out such as contexts or projects etc.

Further right still at the top of the view will be the name of the specific view that you are looking at.

Next to that is the sort button, this button looks like lines of unequal length. Tapping it will open the sort menu for the task view.

NEW It is now possible to sort the tasks by the due date.

After that is the plus or add button, tapping this button will open the task editor and allow you to add a new task.

FYI If you are using an iPad the magnifying glass to the right of the add button opens the search dialogue. The iPhone has a dedicated search view that serves the same purpose.
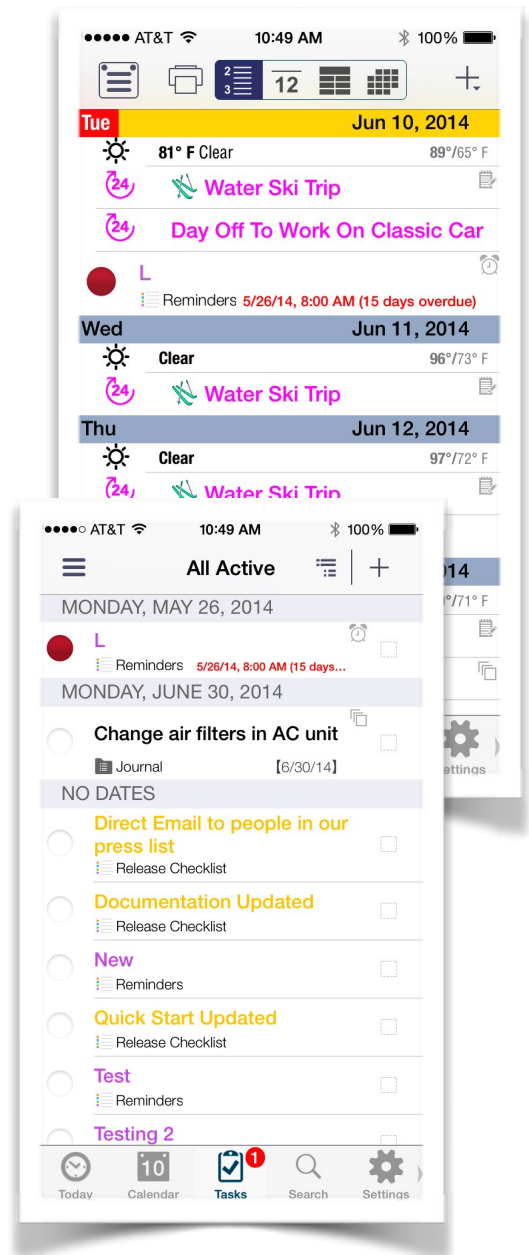
There are groups, and filters listed there and tapping any of them will show you the tasks that match that group or filter criteria. The Smart Filters are user defined filters. We'll talk more about those later in the task section.

At the far right of each task listed is a box , tapping the box in several tasks will allow you to multi select them. This will give you the ability to edit, complete or delete several tasks at a time.

Search View Navigation (iPhone Only)-

On the iPhone the next view is the Search View. On the iPhone tap the Search View then enter your search criteria. The results will be displayed in a list. On the iPad the results will be displayed the same way. Tapping an item will show its details.

The next set of views will vary in their order display order between the iPad and iPhone.
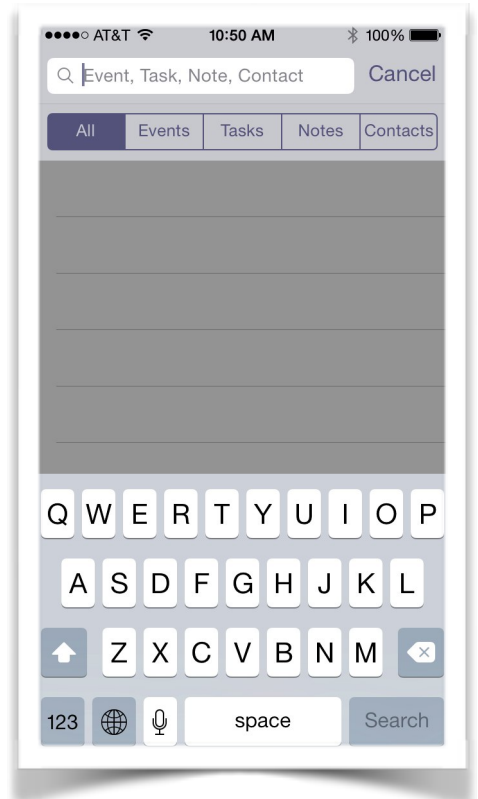
Notes View Navigation-

The Notes View is the place where you can record voice notes or enter notes by hand.
The left pane (iPad) or slide out will have the filters and groupings for your notes. Tapping a note will open it. The list of notes and the notes themselves can be swiped up or down to navigate as needed.

Contacts View Navigation-

As our tour of Informant continues the next stop is the Contacts View. This view is the Informant presentation of the contacts database that is on your device. If you can see a contact in the built in contacts application you will be able to see it in Informant and vice versa.

The left side pane or slide out shows the contact groups while the right side or main contacts view shows the contacts in a list form. Tap a group to see its contacts, and tap a contact to see the details. Contacts and be shown by pictures as well. In this mode a left to right or right to left swipe will page through the contacts and their photos.

FYI On the iPhone you will need to view the contacts in the landscape orientation for the photos to be visible.
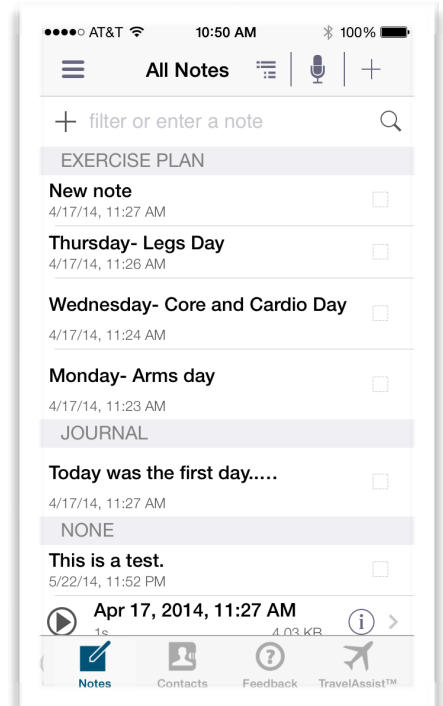
Travel Assist-

NEW This view provides controls to make Informants Time Zone support more user friendly by automatically setting Time Zones for events occurring during a travel period. At the top of the Travel Assist view is a plus sign tap this to add a trip. When the trip is set the timezone information will be shown here.

Settings View Navigation-

Next stop is the Settings View. In this view the left pane or slide out will show the settings categories, tap a category to see those settings which will be visible in the main part of the view. Tap the setting to see the options it can be set to.

Feedback Area Navigation-

The final stop on our tour of Informant is the Feedback Area. In this view you can get help and see tips, open a case to support, sign up for our newsletter, or provide
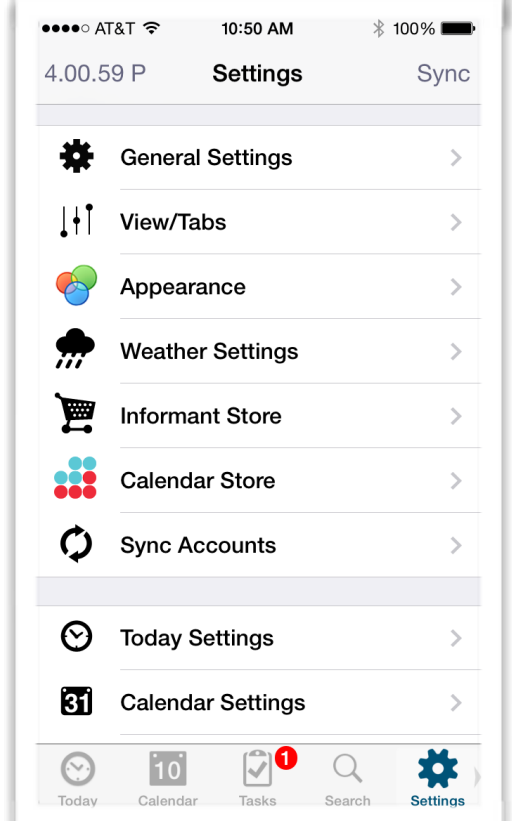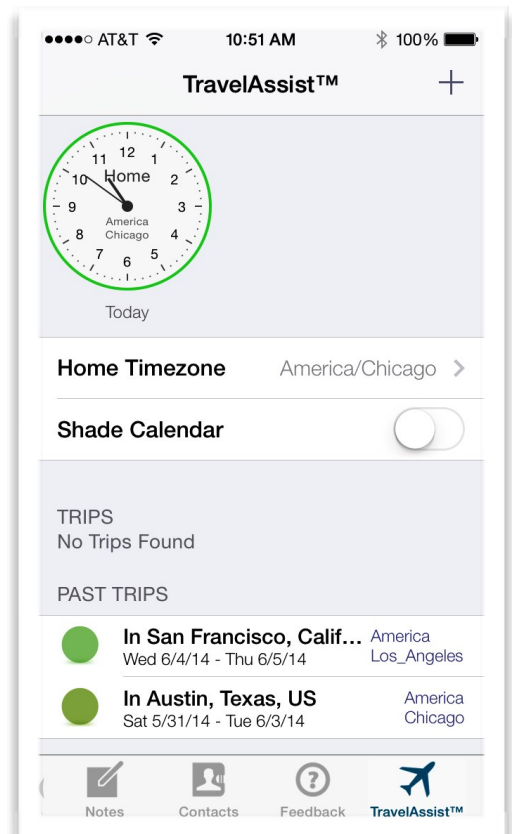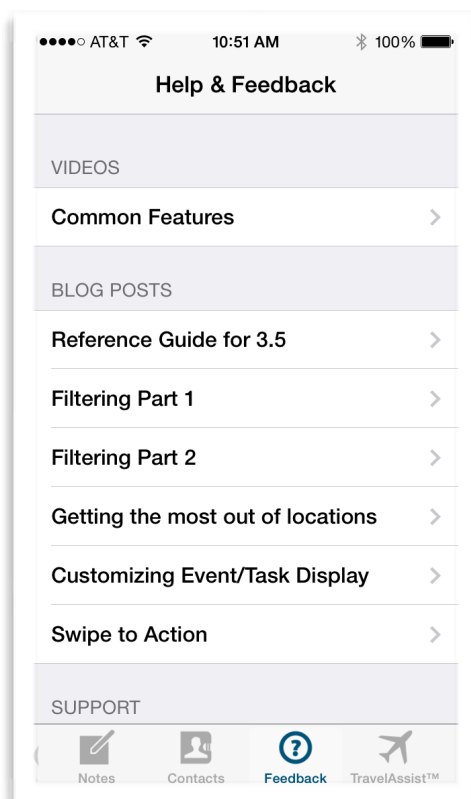
feedback on Informant.

Well, that concludes our geography tour of Informant please read on for more details about the views mentioned above and how to use Informant.

Population-

For all that Informant is capable of doing, without any data its all for naught. There are several ways to get data into Informant.

Data can be entered in manually, or the data can be synced to populate Informant. The other option for populating Informant is to use the data from the iOS calendar and iOS reminders apps built into your device.

The contacts are populated with the data from the contacts database on the device itself.

Most Informant customers will sync the data into and out of Informant on their devices. First we will explain what syncing is then expand into an explanation of the sync services that Informant Pro currently supports.

Syncing Overview-

This is the subject that consumes a large portion of our support bandwidth. Occasionally customers have inadvertently gotten themselves into trouble by not fully understanding what syncing data encompasses, what the limitations are and what to do if there is ever a problem with syncing, our goal here is to educate on the basics before we discuss the syncing specifics.

The act of synchronizing (syncing) data is the process of exchanging data between two systems. The data is sent from one device via an internet connection and sync service to a second device. Hundreds of processes work together at the same time to make syncing happen. At the most basic level, data is being copied and transmitted then received and this often occurs between unrelated systems, for example the Google Calendar sync is in no way related to the Informant application but data, even with
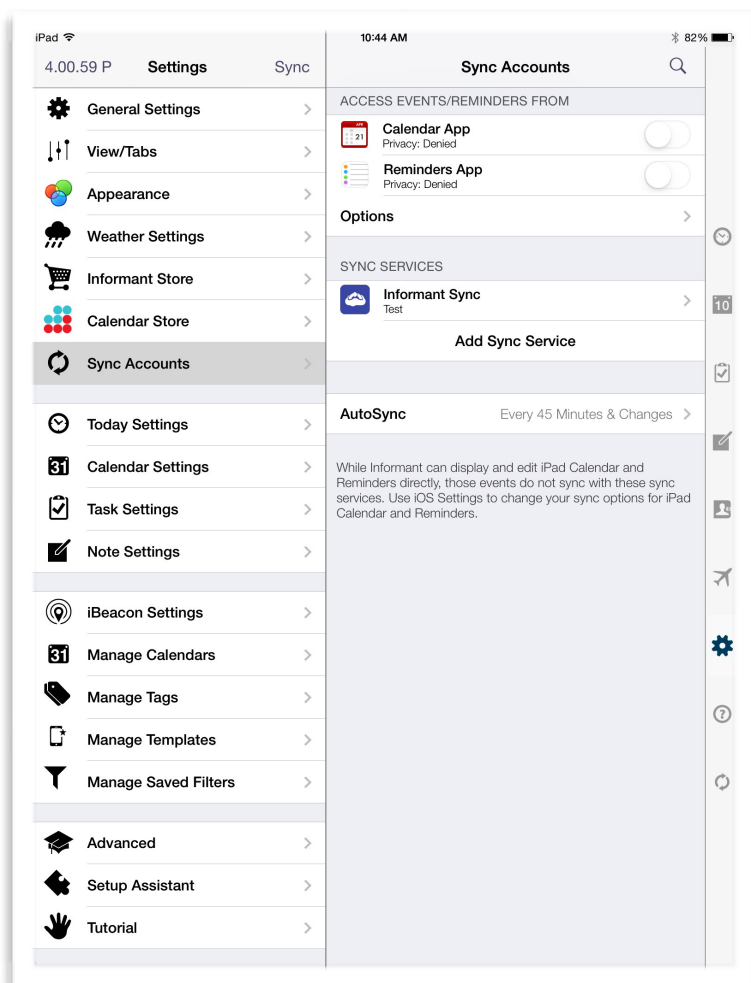
different origins and formats can be passed between the two.

FYI At various moments during a syncing process the data can be vulnerable should an error occur the data can be impacted. Every possible precaution is taken to prevent this but sometimes things happen that are outside of the realm of the application some examples would be the internet connection being interrupted during a sync process, or the application being stopped by the user while a sync is taking place, and there is always the possibility of the sync service itself having an issue and any one of a hundred or more other things. Chances are that you will never encounter one of these errors but it can and does happen. The Informant application does all that is possible to prevent these kinds of errors but it also prepares for them by making regular internal backups of its data so that if the unexpected does occur the recovery can be as simple as possible.

Syncing data from the customer standpoint is very simple. You will need to decide what sync services you would like to use, then make sure that you mirror the settings on each device running Informant.

The Informant application supports many sync services. The sync services can be used alone or several services can be synced to Informant at the same time.

We have created the chart below to help you decide which sync services are the best suited to your needs.

Sync Service	Events	Tasks	Notes	Settings	Web Interface	Subscription Required
Informant Sync	x	x	x	x		x
Google Calendar	x				x	
Google Task		x***			x	
Toodledo		x	x		x	x*
Evernote			x		x	x**
* To use subtasks or custom alarms a subscription is required						
** To use the advanced formatting and reminders a subscioption is required						
*** It is strongly recommended that you use the Simple Task Mode with this sync service						

Informant Sync (Formerly known as Informant Online)-

This is the premium sync service for the Informant application. The Informant Sync service is the most complete sync solution. It will sync events, tasks, notes, voice notes, attachments such as photos or contacts applied to an event task or note, and all other item elements such as tags, icons etc. Informant Sync also has the capability to convert emails to tasks. This sync service includes a tool that will easily migrate your Informant data from other sync sources to Informant Sync.

Informant Sync does require an annual $14.99 subscription fee, however each new Informant Sync account starts with a two week free trial. At this time the Informant Sync does not include a web interface as part of the subscription.

Google Calendar-Is one of the longest serving sync services associated with Informant. This service will only sync events. Data fields which Informant supports, and Google doesn't (Tags, icons, and multiple Locations) are automatically synced to/from Google using hidden "extended properties". They are not visible in Google, but they are retained during sync, and accessible in Informant. Google Calendars have an excellent web interface that will provide a means to access your data directly from your desktop. The sync service is free and can present data from other Google accounts linked to your own.

Google Tasks-

This sync service allows you to sync tasks to and from your Google account. The Google Task support is very basic. It does not support many of the standard task features found within the Informant application. We suggest that you set Informant to the simple task mode for use with this sync service. The one notable task feature which Google Task Sync supports, but Informant limits, is multiple levels of tasks with parent/child relationships. Informant only supports one level of child tasks, whereas in Google, child tasks can themselves have child tasks.

The task list itself as shown in the Google Task View on the website is what gets translated to be the folder/project in Informant. Google tasks share the same web interface as the Google Calendar does.

Toodledo-

The Toodledo sync service can sync notes and tasks. The basic service is free while there is an annual subscription for upgraded Toodledo accounts. Upgrading to one of the paid Toodledo accounts provides support for the syncing of subtasks and custom alarms. Toodledo is a very good and capable sync partner for tasks and notes. The Toodledo sync supports nearly all of the same task features as Informant. There are a few exceptions such as the progress indicator and the icons that cannot be synced. The notes sync is basic as notes formatting isn't always held in place but this is still a very effective tool for sharing. In Toodledo notes, much like tasks are fully editable. Toodledo has a very user friendly web interface.

Evernote-

This sync service is primarily for notes syncing . The basic service is free and provides basic notes syncing capabilities. The Premium upgrade does have an annual subscription cost but adds support for checklists and to do's. These are not the same as the checklists and to do's that Informant uses in the Task View, the Evernote to do's and checklists are essentially attachments to notes and not standalone items. Evernote

has a very good user interface and is a standard in the industry for notes syncing and management.

iCloud Reminders-

This sync service allows tasks to be synced from Informant to an iCloud account. This is a free sync service. It is not the same as having the iOS Reminders support turned on inside of the Informant application. In addition to the same task elements that you would see in the iOS Reminders many of the Informant task elements (such as tags, contexts, and icons) are automatically synced in hidden "extended properties". They are not visible in iCloud, but they are retained during sync, and accessible in Informant. These tasks, once synced, will be visible in any other iOS Device or Mac that is using the same iCloud account.

FYI It is not advised to use the iOS Reminders integration and iCloud Reminders at the same time in Informant as the data is duplicated in the Informant application. iCloud has very good web interface that can also be used to view, add, edit or delete iCloud Reminders.

iOS (Device) Calendars/Reminders-

You can integrate the calendar and reminders data that is in your device with Informant. This is not a sync service. This data is never synced into or out of Informant using this configuration. When the iOS Calendars and iOS Reminders are enabled in Informant you can view, edit, add and delete items that are in the calendar and reminders applications on your device. This is possible because when the Calendar App and Reminders App slider is enabled in Informant the Device Calendar and Device Reminders own database is being directly edited from Informant. If your device, in its own settings, has an active iCloud or Exchange account then your device will sync the data to iCloud or Exchange where other devices (or in the case of Exchange) Outlook will have access to the data. In this configuration Informant presents the device Calendar and Reminders data exactly as it is in the devices own database.

 FYI If you create an event using the Informant elements, when you assign the event to an iOS calendar the un-supported items such as tags, attendees, attached contacts or photos will be removed as the iOS Calendar database has no place to hold those items. iOS Reminders are similar in that once the sync to field is set to iOS Reminders all un supported task elements will be removed from the editor.

FYI Data that is device based such as the iOS Calendar data and iOS Reminders data is not backed up inside of the Informant application. Instead the device data is backed up when the iPhone or iPad itself is backed up. This is because the iOS data is not held inside of the Informant application and therefore cannot be backed up within the Informant database.

FYI Any data that is part of the iOS Events or iOS Reminders database cannot be synced to any of the Informant supported sync services. The iOS data cannot be synced by the Informant application because the iOS data is not part of the Informant database.

The iOS calendars when searched will search the data for 15 years back and all future events. Previously the limit was one year in each direction.

NEW iOS Reminders will now show their list colors for their projects.

Operation-

In the sections following we will get into the detailed explanation and operation of the Informant application. We will start by discussing and instructing on how to sync the data. We will not only talk about how to sync data but how to avoid getting in trouble when syncing and what to do if you ever encounter a sync difficulty.

Details of the views will come next, we will give you all the information that you need to understand how the views work and you will be able to see what views you like the best.

The settings will be explained in detail so that you can configure Informant to fit like a glove for your specific needs and desires.

How To Sync Your Data-

Syncing your data adds a great deal of functionality to Informant. Before we get into the details of syncing it is a good time to explain some basic rules and limitations that apply to all of the sync services. These are listed below;

Tasks, Events and Notes can only be synced to one sync service. This means that while you may be using multiple sync services with Informant, the items themselves can only be assigned and synced to one service. For example an event can only be assigned and sync to one of the sync services that your Informant is using. In other words the data cannot be in two places (different sync services) at the same time.

When a sync service syncs for the first time it will make a sweep through the Informant database and will pick up any compatible data that is not assigned to another sync service and sync it.

If an item, event, task or note, is not assigned to a specific sync service it will not be synced.

You can set a default sync service for your data so that when you create a new item it will automatically be assigned to the sync service that you designated as the default.

The device must be connected to the internet for a sync to take place.

Synced data is not "pushed" to other devices syncing to the same account, those devices will all have to have a sync operation run to get the latest data changes. Informant has numerous auto sync settings for this purpose.

Most of the sync services only support a subset of the data elements that Informant supports. Only the Informant Sync service can sync all of the Informant application data and elements.

Informant Sync (formerly Informant Online)-

To use Informant Sync the first thing you will need to do is create an Informant Sync account. You can use the following link to do so. https://pocketinformantonline.appspot.com/signup . Alternatively, you can do this within Informant, when setting up and configuring the sync service.

When your Informant Sync account is set up please go into the Informant Application on your device and go into the settings area, then tap the sync accounts tab.

Tap "Add Sync Service" to open a list of sync services to add. Please select Informant Online or Informant Sync from the list.

Tap "Sign In" to enter your login information. At this point, if you haven't already created a Informant Online account on the server, then you can tap "Create Account" in order to do so. Once you're signed in, then tap the begin sync button.

FYI While the initial sync is taking place it is strongly recommended that you keep your device and the Informant application open until it is completed. It is also recommended that this initial sync take place over a good wifi connection.

FYI To migrate your iOS Calendar Data to Informant Sync please use the following steps. Set up the Informant Sync account, and do the initial sync. Make sure that the Device Calendars are enabled (Settings -> Accounts -> Calendar App switch). Go to Settings -> Accounts -> Informant Sync, and there will be an option to "Migrate Data". Tap that, and one of the options in there will copy all Device (iOS) Calendars and their Events over to Informant Sync. It will also automatically disable the Calendar App switch as well, so you don't see duplicate data.

You can sync other devices with the Informant application to your Informant Sync account. There is no limit on how many devices you can sync to the account.

When setting up additional devices to sync to your Informant Sync account the guidelines below will help you to have the best syncing experience possible.

First you will want to make sure that you do not have more than one device doing its initial sync to Informant Sync at the same time. Essentially the steps to set up are the same. Once this device has completed the initial sync, you can repeat the procedure on the next device until you have successfully completed the initial sync on all of your devices that you wish to sync to Informant Online.

FYI Informant Sync can also sync with the Informant application on Android allowing for a cross platform transfer of data. If you have an Android device and an iOS device both with Informant you will be able to sync data between them with Informant Sync.

CAUTION---CAUTION---CAUTION

Inadvertently you can cause your data in Informant Sync to be duplicated. If you are adding a device to share your Informant Sync service but a lot of its data already matches what you've been syncing previously, the new devices data will be treated as new. This will create duplicated data.

To avoid this it is a good idea, if you are adding a new device to sync, that has a lot of the same information in Informant that the other devices that you clear the data out of Informant on the new device and let it sync in the data from Informant Online. This will keep your data clean and free of duplicates.

In the event that Informant is disconnected from syncing to Informant Sync for an extended period of time or if the sync service is turned off or removed and added back into the application the data in the Informant application may be synced a second time causing a condition of duplicated data.

Good syncing practices as mentioned above will prevent this from occurring.

If you are using gSyncit and Outlook on the PC to sync to Informant Sync the following instructions are very important.

Initiate a sync in gSyncit to your empty Informant Sync account before syncing any devices. Once gSyncit has finished syncing you can add your devices to sync as described above. If the data in Outlook does not mirror that of the data in the device then you can sync the first device without removing the Informant data. However on all following devices it will work best to clear the Informant data before adding the devices to sync to Informant Sync.

Email To Task

This feature allows a user to send an email message to the Informant Sync server, which it will convert directly into a Task in your Informant Sync account. The subject line of the email becomes the Task title, and the message body becomes the Task note. Each Informant Sync user is able to generate a private email address that is specific to their sync account. All emails sent to it (regardless the source) will be converted into a Task for that user. Each user's private Task email address has the form:

task.xxxxxx@pocketinformantonline.appspotmail.com

Where the xxxxxx is a set of random characters unique to each user.

This email address is shown in the Informant Sync (Informant Online) sync settings. This address can be generated or changed in these settings.

Additional Task Fields

When a Task email is received, the server will extract the following fields:

- **Task title** - from the email subject line.
- **Task notes** - from the email message body.

In addition to that, it will also parse through the email subject line looking for special syntax that indicates other Task data fields. These generally follow the format defined by Toodledo (http://www.toodledo.com/info/help_email.php).

- **Due Date (#)** - To set a due-date, use the # symbol and then type the due-date. For example: "#today" or "#Next thursday" or "#5/12/08".
- **Start Date (>)** - To set the start date, use the > symbol and then the date. For example: ">tomorrow".
- **Priority (!)** - The default priority is "0 - Low". To set a higher priority use the ! character as many times as necessary. Typing !! would give your task a priority of "2-High".
- **Star (*)** - To star a task use the * symbol by itself. For example: "My Task *".
- **Folder (*)** - To set the folder use the * symbol and then type the name of your folder. For example: "*ProjectA".
- **Context (@)** - To set the context use the @ symbol and then type the name of your context. For example: "@home". Remember that the @ symbol is a special instruction to Toodledo and is not part of your context name. If your context is actually named "@home" then you would need to type "@@home" to set the context, since the first @ is the symbol and the second @ is part of your context.
- **Action ($)** (aka: Status) - To set the status use the $ symbol and then the status. For example: "$Next Action".
- **Tag (%)** - To set the tag use the % symbol followed by the tag or tags that you want to add. For example: "%tag1, tag2".

Task fields that are <u>not</u> (yet) supported in the subject line are:

- **Start Time**
- **Due Time**
- **Task Duration**
- **Repeat**
- **Location**
- **Parent Task**
- **Child Task**
- **File Attachments**

Truncating the Message Body (Task note)

If the text "**-end-**" is found somewhere in the email message body, then it will be truncated at that point. Nothing coming after that marker will be included in the resulting Task note field.

Examples

- *Call Jim !! @phone #today*
- *Finish the Report ! #2013-05-23 *ProjectA @work $Active*
- *Mow the lawn *Chores @home*

Informant Sync Advice And Notes-

The tips below can help you to get the most from your Informant Sync service.

Although Informant Sync will sync contact attachments on events and tasks, it does not sync the contacts database as a whole. The contacts database is not part of the Informant application and is just a display of the devices contacts database shared with the Informant application.

Informant Sync does sync all of the Informant application elements, it will not sync iOS Calendar data or iOS Reminders data as these are not part of the Informant database and are simply shared with Informant by the device.

If you have other sync services in use in Informant then add an Informant Sync service, the data in the Informant application that is assigned to the other sync services will not be synced to Informant Sync. To sync to Informant Online and be picked up during the initial sync the data has to be a "free agent" so to speak meaning that it cannot be assigned to any other sync service in order to sync with Informant Sync.

Once Informant Sync has completed an initial sync it does have a migration utility that will move the data from your existing sync services to the Informant Sync service and will remove the other sync services   from Informant. This is all done automatically. To access this feature you will need to go into the Informant sync account settings, and tap "Migrate Data". Once in the migration utility you will be able to   choose what items you wish to bring into the Informant Sync   service.

There is no method that will allow Informant Sync data to sync to Google in any way.

If you have attachments like a photo or a contact on a task, note or event and sync over the cellular data connection it is possible that your attachments will not have been synced to your other device(s). This is because by default, Informant is set to not sync attachments unless the device is on Wi-Fi. These settings can be changed by going into Informant application settings,accounts, Informant Online sync options and turning off the Wi-Fi restriction.

In most cases where it appears that the sync is only working in one direction please check the data that does not seem to be syncing and make sure that if it is an event please make sure that the event is assigned to a calendar that is set to sync to

Informant Online, for tasks and notes please make sure the   sync to field is set to Informant Online.

As with all sync services the amount of data being synced and speed of the internet connection will be factors in how long a sync operation takes to complete. A large database on an average to slow internet connection can take a few minutes to complete a sync operation. This is not an indication of an issue or a sync failure but rather an explanation of why sometimes your sync may compete quickly while at other times is may take a bit longer.

In the event that you have a sync error or sync difficulty please contact Pocket Informant support as soon as possible as it is very easy if an error occurs to cause your sync data to duplicate or in extreme cases to be lost.

Informant Sync is a subscription based service. The annual cost is $15, most of this fee goes to cover the cost of the servers and bandwidth used to run the service. In Informant for iOS you can use the Informant Sync right up to the moment when the sync subscription expires. Upon expiration your data is safe as the account simply prevents a sync from occurring. You will be at this point prompted to purchase another years subscription. If you do your syncing will resume normally, if you choose not to renew you will want to remove the Informant Online sync service from the application, be sure to just remove the account but to leave the data, so that the data will be available to sync to any other sync service you wish to use.

Google Calendar Sync-

To use the Google Calendar sync you will need to use the following link to create a Google account if you do not already have one. https://www.google.com

In your Google account if you click on the calendars tab you can customize your Google Calendar to show sports calendars or holiday calendars or many other special interest calendars. Once you can see the data in the Google Calendar it will sync to Informant.

FYI Due to copyright issues some sports calendars are not able to be synced

Once your account is set up online you will need to set Informant up to sync. To do this please go into the Informant settings, accounts, and tap "Add Sync Service" to open the sync services list, select Google Calendar.

Enter your Google account login information and sign in.

You can sync as many devices with Informant to your Google account as you wish.

You can also sync Informant to multiple Google accounts. For example if you have a Google account for work and one for home Informant can concurrently sync with both accounts or more if necessary.

Event data that is not assigned to another sync service and is not based in the iOS (native) calendar will be added to the Google Calendar sync during the initial sync operation.

After the initial sync operation, event data when created in Informant will need to be assigned to a calendar that is designated to sync to Google in order for it to be synced.

FYI If you are using an Android device with Informant installed on it the Google data will be synced to that device by the device because the Google Calendar is the native calendar on an Android device. The Informant Android application does not sync to Google Calendar. When the device itself syncs the Google Calendar data the device shares that data with the Informant application.

CAUTION---CAUTION---CAUTION

Inadvertently you can cause your data in your Google Calendar to be duplicated. If you are adding a device to share your Google Calendar sync service but a lot of its data already matches what you've been syncing previously, the new devices data will be treated as new. This will create duplicated data.

To avoid this it is a good idea, if you are adding a new device to sync, that has a lot of the same information in Informant that the other devices have that you clear the data out of Informant on the new device and let it sync in the data from Google Calendar. This will keep your data clean and free of duplicates.

In the event that Informant is disconnected from syncing to Google Calendar for an extended period of time or if the sync service is turned off or removed and added back into the application the data in the Informant application may be synced a second time causing a condition of duplicated data.

Good syncing practices as mentioned above will prevent this from occurring.

If you are using gSyncit and Outlook on the PC to sync to Google Calendar data the following instructions are very important.

Initiate a sync in gSyncit to your Google Calendar account before syncing any devices. Once gSyncit has finished syncing you can add your devices to sync as described above. If the data in Outlook does not mirror that of the data in the device then you can sync the first device without removing the Informant data. However on all following devices it will work best to clear the Informant data before adding the devices to sync to Google Calendar.

The tips below can help you to get the most from your Google Calendar sync service.

The Informant to Google Calendar sync and vice versa does not sync   contacts at all, the contacts database on the device is not part of the Pocket   Informant application and is just a display of the device contacts database shared   with the Informant application. The Google contacts have to be synced to   the device contacts database which is not possible for Informant to do.

If you have other sync services in use in Informant then add a Google   Calendar sync service, the event data in the Informant application that is   assigned to other sync services will not be synced to This Google Calendar   account. To sync to Google Calendar and be picked up during the initial sync the   data has to be a "free agent" so to speak meaning that it cannot be assigned to   any other sync service.

There is no method that will allow the Google Calendar data to sync to Informant Online in any way.

If you have attachments like a photo or a contact on an event and sync to Google Calendar the attachment will not sync as the Google Calendar sync does not support the syncing of attachments.

In most cases where it appears that the sync is only working in one direction please check the data that does not seem to be syncing and make sure that the event is assigned to a calendar that is set to sync to Google Calendar.

As with all sync services the amount of data being synced and speed of the internet connection will be factors in how long a sync operation takes to complete. A large database on an average to slow internet connection can take a few minutes to complete a sync operation. This is not an indication of an issue or a sync failure but rather an explanation of why sometimes your sync may compete quickly while at other times is may take a bit longer.

A unique property of the Google Calendar sync is that you can set up your device itself to sync your Google Calendar data and have Informant set up to sync that same data. If you have the calendar app support turned on in the Informant settings this configuration will cause your data to appear duplicated. In reality the data is not duplicated but is being presented once by the device from its sync and again through Informant and its sync to the Google Calendar account.

There are two ways to correct this condition. You can go into the Informant settings, accounts and turn off the calendar app slider.

The other way would be to go into the Informant settings, accounts, and   remove the Google Calendar sync service and all of its data.

Either option would leave you with one set of the Google Calendar data and would correct the display of duplicated data in Informant.

In the event that you have a sync error or sync difficulty please contact Pocket Informant support as soon as possible as it is very easy if an error occurs to cause your sync data to duplicate or in extreme cases to be lost. If you are contacting support regarding duplicated data and you have verified that you do not have the double sync taking place please login to your Google account online and see if your event data is duplicated there. When you submit your support case please let the technicians know if the data online is duplicated. That information helps our support team to help you correct things much more quickly.

Google Task Sync-

To use the Google Task sync you will need to use the following link to create a Google account if you do not already have one. https://www.google.com

In your Google account if you click on the calendars tab you can see the task lists, they will be shown off to the right. Only one task list at a time will be shown.

Once your account is set up online you will need to set Informant up to sync. To do this please go into the Informant settings, accounts, and tap "Add Sync Service" to open the sync services list, select Google Tasks.

Enter your Google account login information and sign in.

Before you tap the begin sync button you will want to go into the Google Task sync options and check the metadata setting.

This is a very important setting. The Informant database is capable of supporting several task elements that the Google database cannot. The metadata setting resolves this, when in the "on" position the unsupported event elements such as tags, icons etc. are converted to metadata and stored in the comments field of the task. When the data is synced to Informant on another iOS device with the Google Task sync metadata enabled the metadata is converted back into the tags, icons etc.

If this setting is off during the initial sync the unsupported item elements are removed during the sync operation and will not appear on the second device, only those elements that are supported by Google Task will be visible.

If the feature is enabled after the initial sync has completed, then the change would only be applied to new items that are entered after the setting was changed or existing items that were edited and saved after the change was made.

After you have chosen to enable or not to enable the metadata please tap the begin sync button.

This will start the initial sync. Once this is completed you should have a two way sync between Informant and Google.

You can sync as many devices with Informant to your Google account as you wish.

You can also sync Informant to multiple Google accounts. For example if you have a Google account for work and one for home Informant can concurrently sync with both accounts or more if necessary.

Task data that is not assigned to another sync service and is not based in the iOS (native) Reminders app will be added to the Google Task sync during the initial sync operation.

After the initial sync operation, task data when created in Informant will need to have Google Task set in the sync to field in order for it to be synced.

CAUTION---CAUTION---CAUTION

Inadvertently you can cause your data in your Google Task list to be duplicated. If you are adding a device to share your Google Task sync service but a lot of its data already matches what you've been syncing previously, the new devices data will be treated as new. This will create duplicated data.

To avoid this it is a good idea, if you are adding a new device to sync, that has a lot of the same information in Informant that the other devices have that you clear the data out of Informant on the new device and let it sync in the data from Google Tasks. This will keep your data clean and free of duplicates.

In the event that Informant is disconnected from syncing to Google Tasks for an extended period of time or if the sync service is turned off or removed and added back into the application the data in the Informant application may be synced a second time causing a condition of duplicated data.

Good syncing practices as mentioned above will prevent this from occurring.

If you are using gSyncit and Outlook on the PC to sync to Google Tasks the following instructions are very important.

Initiate a sync in gSyncit to your Google Task account before syncing any devices. Once gSyncit has finished syncing you can add your devices to sync as described above. If the data in Outlook does not mirror that of the data in the device then you can sync the first device without removing the Informant data. However on all following devices it will work best to clear the Informant data before adding the devices to sync to Google Tasks.

The tips below can help you to get the most from your Google Calendar sync service.

The Informant to Google Task sync and vice versa does not sync   contacts at all, the contacts database on the device is not part of the Informant application and is just a display of the device contacts database shared   with the Informant application. The Google contacts have to be synced to the device contacts database which is not possible for Informant to do.

If you have other sync services in use in Informant then add a Google Task sync service, the task data in the Informant application that is assigned to other sync services

will not be synced to this Google Task account. To sync to Google Task and be picked up during the initial sync the data has to be a "free agent" so to speak meaning that it cannot be assigned to any other sync service. The sync to field of the task has to show "none".

There is no method that will allow the Google Task data to sync to Pocket Informant Online in any way.

If you have attachments like a photo or a contact on a task and sync to Google Tasks the attachment will not sync as the Google Task sync does not support the syncing of attachments.

In most cases where it appears that the sync is only working in one direction please check the data that does not seem to be syncing and make sure that the sync to field of the task is showing Google Tasks.

As with all sync services the amount of data being synced and speed of the internet connection will be factors in how long a sync operation takes to complete. A large database on an average to slow internet connection can take a few minutes to complete a sync operation. This is not an indication of an issue or a sync failure but rather an explanation of why sometimes your sync may compete quickly while at other times is may take a bit longer.

A unique property of the Google Task sync is that you can set up your device itself to sync your Google Task data and have Informant set up to sync that same data. If you have the reminders app support turned on in the Informant settings this configuration will cause your data to appear duplicated. In reality the data is not duplicated but is being presented once by the device from its sync and again through Informant and its sync to the Google Tasks account.

There are two ways to correct this condition. You can go into the Pocket Informant settings, accounts and turn off the reminders app slider.

The other way would be to go into the Informant settings, accounts, and remove the Google Task sync service and all of its data.

Either option would leave you with one set of the Google Task data and would correct the display of duplicated data in Informant.

In the event that you have a sync error or sync difficulty please contact Pocket Informant support as soon as possible as it is very easy if an error occurs to cause your sync data to duplicate or in extreme cases to be lost. If you are contacting support regarding duplicated data and you have verified that you do not have the double sync taking place please login to your Google account online and see if your event data is duplicated there. When you submit your support case please let the technicians know if

the data online is duplicated. That information helps our support team to help you correct things much more quickly.

When using the Google Task sync as your primary task sync service we also advise setting the Informant task mode to simple. The Google Task sync   is very basic task support and in the standard task modes Informant supports many fields that are not available in Google Tasks, during the sync these unsupported fields are removed. By using the simple task mode you will be more closely aligning the task support in Informant with that of Google Tasks.

Projects, or folders, within Informant, correspond to task lists in Google. Since the Google website only displays one task list at a time, if you do not see a task there that you synced from Informant, make sure to check all of the lists and not just the one displayed as your task may be on one of the other lists.

In Informant it is possible to create checklists in the tasks (not in simple task mode). The checklist items will sync to Google as child tasks. If the "Save Meta Data in Notes Field" sync option is turned on, then these checklist tasks, and their checklist items (subtasks) will sync back down to Informant intact, as checklists.

Toodledo-

To use the Toodledo Task/Note sync you will need to use the following link to create a Google account if you do not already have one. http://www.toodledo.com

In your Toodledo account online there are a couple of options for your account. Toodledo free (basic) and Toodledo Pro. Toodledo Pro adds two important task features, the support of subtasks and the support of task alarms. Toodledo Pro is an annual subscription, if you do not renew your account will revert to a basic account, you will lose sub task support and alarm support but your tasks and notes will not be lost.

Once your account is set up online you will need to set Informant up to sync. To do this please go into the Informant settings, accounts, and tap the plus button to open the sync services list, select Toodledo.

Enter your Toodledo account login information and sign in.

Before you tap the begin sync button you will want to go into the Toodledo sync options and turn on the notes syncing if you wish to use that feature.

Toodledo supports nearly every Informant task element with a few exceptions such as completion percentage and the syncing of photo or contact attachments.

After you have chosen to enable or not to enable the notes please tap the begin sync button.

This will start the initial sync. Once this is completed you should have a two way sync between Informant and Toodledo.

You can sync as many devices with Informant to your Toodledo account as you wish.

You can also sync Informant to multiple Toodledo accounts. For example if you have a Toodledo account for work and one for home Informant can concurrently sync with both accounts or more if necessary.

Task/Notes data that is not assigned to another sync service and is not based in the iOS Reminders (native) database will be added to the Toodledo Task/Notes sync during the initial sync operation.

After the initial sync operation, task/notes data when created in Informant will need to have Toodledo set in the sync to field in order for it to be synced.

CAUTION---CAUTION---CAUTION

Inadvertently you can cause your data in your Toodledo sync service to be duplicated. If you are adding a device to share your Toodledo sync service but a lot of its data already matches what you've been syncing previously, the new devices data will be treated as new. This will create duplicated data.

To avoid this it is a good idea, if you are adding a new device to sync, that has a lot of the same information in Informant that the other devices have that you clear the data out of Informant on the new device and let it sync in the data from Toodledo. This will keep your data clean and free of duplicates.

In the event that Informant is disconnected from syncing to Toodledo for an extended period of time or if the sync service is turned off or removed and added back into the application the data in the Informant application may be synced a second time causing a condition of duplicated data.

Good syncing practices as mentioned above will prevent this from occurring.

If you are using gSyncit and Outlook on the PC to sync to Toodledo the following instructions are very important.

Initiate a sync in gSyncit to your Toodledo account before syncing any devices. Once gSyncit has finished syncing you can add your devices to sync as described above. If the data in Outlook does not mirror that of the data in the device then you can sync the first device without removing the Informant data. However on all following devices it will work best to clear the Informant data before adding the devices to sync to Toodledo.

The tips below can help you to get the most from your Toodledo sync service.

If you have other sync services in use in Informant then add a Toodledo sync service, the task/note data in the Informant application that is assigned to other sync services will not be synced to this Toodledo account. To sync to Toodledo and be picked up during the initial sync the data has to be a "free agent" so to speak meaning that it cannot be assigned to any other sync service. The sync to field of the tasks and notes has to show "none".

There is no method that will allow the Toodledo data to sync to Informant Online in any way.

If you have attachments like a photo or a contact on a task or note and sync to Toodledo the attachments will not sync as the Toodledo sync does not support the syncing of attachments.

In most cases where it appears that the sync is only working in one direction please check the data that does not seem to be syncing and make sure that the   sync to field of the task is showing Toodledo.

As with all sync services the amount of data being synced and speed of the internet connection will be factors in how long a sync operation takes to complete. A large database on an average to slow internet connection can take a few minutes to complete a sync operation. This is not an indication of an issue or a sync failure but rather an explanation of why sometimes your sync may compete quickly while at other times is may take a bit longer.

In the event that you have a sync error or sync difficulty please contact Pocket Informant support as soon as possible as it is very easy if an error occurs to cause your sync data to duplicate or in extreme cases to be lost. If you are contacting support regarding duplicated data and you have verified that you do not have the double sync taking place please login to your Toodledo account online and see if your event data is duplicated there. When you submit your support case please let the technicians know if the data online is duplicated. That information helps our support team to help you correct things much more quickly.

In Informant it is possible to create checklists in the tasks (not in simple task mode). These checklists cannot be synced but upon syncing will turn into   individual tasks.

iCloud Reminders-

The iCloud Reminders sync service allows Informant to sync tasks to your iCloud account. Use this if you want to sync to an iCloud account other than the one you have enabled for reminders on your device. You can also use this if you wish to sync many of the additional task fields to/from iCloud, which Informant supports, but iCloud does not. Otherwise, it is recommended to simply enable the iOS Reminders App in Informant (tap the Settings tab, then Accounts).

CAUTION-CAUTION-CAUTION

Setting up the iCloud Reminders sync to use the same iCloud account that your device is currently using can result in your Reminders data being duplicated. To avoid this if you choose to use the iCloud Reminders with the same iCloud account as your device, please go into the Informant settings, accounts and turn off the reminders app slider.

If you have iCloud Reminders set to sync to a different iCloud account from what the device is using this will not be an issue for you.

FYI This is not the same as using the iOS Reminders support inside of the Informant application, this will be explained in greater detail later.

To set up the iCloud Reminders sync service please open the Informant Settings, accounts.   Tap "Add Sync Service" to open a list of sync services to add. Please select iCloud Reminders from the list.

Enter your login information, then tap the begin sync button.

FYI While the initial sync is taking place it is strongly recommended that you keep your device and the Informant application open until it is completed.

You can sync other devices that might be using the same or different iCloud accounts. Since this sync is managed by Informant and not the device, if you have, for example, a co worker who's device syncs with their iCloud account but you want to share your Reminders with them, just have their Informant sync to your iCloud account. Only the Reminders will be accessed by the sync service. So if you have events and other information in your iCloud account the iCloud Reminders sync in Informant will only sync the Reminders data.

The tips below can help you to get the most from your iCloud Reminders sync service.

If you have other sync services in use in Informant then add an iCloud   Reminders sync service, the task data in the Informant application that is   assigned to other sync services will not be synced by the iCloud Reminders   account. To sync to iCloud Reminders and have the task data picked up during the initial sync the data has to be a

"free agent" so to speak meaning that it cannot be assigned to any other sync service. The sync to field of the tasks has to show "none".

There is no method that will allow the iCloud Reminders data to sync to Pocket Informant Online in any way.

If you have attachments like a photo or a contact on a task and sync to iCloud Reminders the attachments will not sync as the iCloud Reminders sync does not support the syncing of attachments.

In most cases where it appears that the sync is only working in one direction please check the data that does not seem to be syncing and make sure that the sync to field of the task is showing iCloud Reminders.

As with all sync services the amount of data being synced and speed of the internet connection will be factors in how long a sync operation takes to complete. A large database on an average to slow internet connection can take a few minutes to complete a sync operation. This is not an indication of an issue or a sync failure but rather an explanation of why sometimes your sync may compete quickly while at other times is may take a bit longer.

In the event that you have a sync error or sync difficulty please contact Pocket Informant support as soon as possible as it is very easy if an error occurs to cause your sync data to duplicate or in extreme cases to be lost. If you are contacting support regarding duplicated data and you have verified that you do not have the double sync taking place please login to your iCloud account online and see if your event data is duplicated there. When you submit your support case please let the technicians know if the data online is duplicated. That information helps our support team to help you correct things much more quickly.

In Informant it is possible to create checklists in the tasks (not in simple task mode). Checklists, and their checklist items will all be synced to iCloud as individual tasks, with no apparent relationship between them. Because all of the checklist-specific information is synced in hidden "extended properties", when they sync back down to Informant, they will appear again as intact checklists.

If you use iCloud Reminders syncing with the same iCloud account that your device is using, and you have the Reminders App setting turned on in the Informant settings you will see duplicated data as any data created in Pocket   Informant that is assigned to the iCloud Reminders will sync to the iOS Reminders and be present in Informant and vice versa giving the false appearance of duplicated data when in reality there are two copies of the data showing one provided by the iOS (Reminders App set to on in the Informant account settings) and the other provided by the iCloud Reminders sync (the Informant directly syncing to the iCloud account). To correct the appearance of duplicated data please go into the PI settings, accounts and turn off the slider for the

Reminders app or go down a little further on the accounts page and delete the iCloud Reminders sync and all of its data.

Either option will remove the duplicated data from Informant.

Since the iCloud Reminders are actually part of the Informant database they can do some things that the normal iOS Reminders cannot. Elements such as contexts and tags can be synced to other iOS devices using Informant application and syncing to the same iCloud account via the Informant iCloud Reminders sync.

Evernote Syncing-

To use Evernote Syncing the first thing you will need to do is create an Evernote account online. You can use the following link to do so. http://evernote.com/index2.php?utm_expid=6007595-10.lTcu9UnvTC-JwqjUz0Q8lA.1

Once you have created an Evernote account you can stay with the free basic version or you can upgrade to the subscription based "Premium" account. An upgrade to the premium version adds additional features of which several can be taken advantage of inside of the Informant application.

When your Evernote account is set up please go into the Informant Application on your device and go into the settings area, then tap the accounts tab.

At the lower right side of the screen you will see a plus sign, tap that to open a list of sync services to add. Please select Evernote from the list.

Enter your login information, then tap the begin sync button.

==FYI== While the initial sync is taking place it is strongly recommended that you keep your device and the Informant application open until it is completed.

You can sync other devices with the Informant application to your Evernote account. There is no limit on how many devices you can sync to the account.

The tips below can help you to get the most from your Evernote sync service.

If you have other sync services in use in Informant then add an Evernote   sync service, the note data in the Informant application that is assigned to other sync services will not be synced to the Evernote account. To sync to Evernote and be picked up during the initial sync the data has to be a "free agent" so to speak meaning that it cannot be assigned to any other sync service.

There is no method that will allow the Evernote data to sync to Informant Online in any way.

If you have attachments such as rich text notes, PDF, Word, Excel, audio   attachments and images.

Basic Evernote sync items are Notebooks, Stacks, Notes, Reminders and Tags.

In most cases where it appears that the sync is only working in one direction please check the data that does not seem to be syncing and make sure that the note sync to field is set to Evernote.

As with all sync services the amount of data being synced and speed of the internet connection will be factors in how long a sync operation takes to complete. A large database on an average to slow internet connection can take a few minutes to complete a sync operation. This is not an indication of an issue or a sync failure but rather an explanation of why sometimes your sync may compete quickly while at other times is may take a bit longer.

FYI If you encounter a sync error with Evernote that refers to a "limit reached" then the steps and information below can help you to resolve that issue.

Evernote instituted per-account rate limits for their synchronization server in November of 2013. If you sync a great deal of notes with a lot of resources, you may hit the rate limit error. Evernote has given us a feature called "Initial Sync Booster" which is setup on Evernote's side and is turned on as of April 17th 2014. The Initial Sync Booster provides an extremely high rate limit for 24 hours after Informant is given access to your Evernote account.

For new users this process should be automatic: Create an Evernote Sync account, sign in and give Informant permission, and then sync within 24 hours.

For users performing a reset sync at a future date you must follow the steps below:

1. Login to the Evernote website and click on your name in the top right->Account Settings.
2. Go to Applications.
3. Revoke permissions to Informant
4. Open Informant and open the Evernote sync account
5. Sign out
6. Sign back in and give Informant permission
7. Sync

Outlook Syncing (PC Only)-

Informant can be configured to sync data to and from Outlook. This is not to be confused with having your device itself configured to sync to directly to an Exchange server. The sync to Outlook should only be used when your device itself is not syncing to Exchange. If the devices Exchange sync and the Informant Outlook sync are used together the results will be less than desirable most likely with all of the data duplicated.

The first step in setting up the Outlook sync is to purchase and install an Outlook add in called gSyncit. This add in makes it possible for the Outlook data to be synced. You can review and purchase the add in here http://www.fieldstonsoftware.com/software/gsyncit3/

With the gSyncit it add in installed you will need to configure it to use to the sync service(s) of your choice. This is done in the gSyncit settings. The sync services that can be used with Informant and gSyncit are as follows; Informant Online, Google Calendar, Google Tasks, Toodledo and Evernote.

You will need to configure gSyncit to mirror the sync accounts being used in the Informant application. It is possible for gSyncit to use more than one sync service.

Below is sync map to help illustrate how this sync configuration works.

Outlook <gSyncit> Sync Service Of Your Choice <-->Informant application

gSyncit is a 3rd party item and is not supported by the Informant Tech Support Group. If you have a difficulty with gSyncit or need assistance configuring specific sync items like tags to categories you will need to contact Fieldstone Software support for assistance. Informant Tech Support can assist you with any sync issues that are occurring between the Informant application and the sync service however for issues between the sync service and Outlook Fieldstone support is the best first contact for help.

The tips below can help you to get the most from your Outlook/gSyncit sync.

The data in Informant when used in this configuration is subject to all of the same limitations normally associated with the sync services chosen to be used. The behaviors between Informant and its supported sync services will remain the same and those have been discussed in detail in the preceding pages.

If you have to restart your sync chain for any reason, it is strongly advised to let your Outlook data serve as the master data and therefore sync first. Upon gSyncits completion of the initial sync you will want to then remove the sync services used with gSyncit and their data from Informant and add them back in and run a first sync. This will prevent your data from getting duplicated by the sync operations.

When using gSyncit it is NOT a requirement to use the Informant Sync (Informant Online) service, it is simply one of the choices of services to use.

Direct Sync To Outlook (No Longer Supported)-

In previous versions of Informant there was a sync option referred to as WDS sync. It was a local area network sync that required Informant to pair with your PC and sync data to and from Outlook via a desktop client that we provided.

This sync service was retired in 2012. As software advanced, Windows, iTunes, iOS, and the Informant application, the direct sync became very unstable and began to use a disproportionate amount of our tech support bandwidth with a low resolution rate.

Due to unforeseen circumstances the engineering group for the project could not provide further development and updates so the decision was made after careful consideration to move forward using gSyncit and the web based sync services. The advantage was far greater reliability, and the ability to sync to Outlook from anywhere that an internet connection was available.

There are some customers still using the sync service today. For some the configuration may function for a very long time or it may quit tomorrow. For the majority of Informant customers this is not a viable sync option for one reason or another with the biggest being that the sync is no longer offered as part of the Informant application.

iOS (Device) Calendar and Reminders Support-

"I've read this far and I think I'm clear on the syncing but where does my device calendar and reminders data come into play?"

Some form of the question above is fielded each day by our support staff. We have touched on the difference earlier in this manual but will provide a quick review here.

Every iOS device has its own calendar and reminders database. This is where the data from the built in Calendar app and Reminders app is stored. This database is wholly owned and managed by the device. The device syncs this data with iCloud or Exchange depending on your configuration.

If you are using your device with an Exchange Server sync then this is where that data is received and sent out. The same applies to the iCloud syncing of the events, contacts and tasks.

The magic is that you can view/edit/add/delete data in this database from within the Informant application because the device is able to share the database with Informant.

To see the iOS Calendar and iOS Reminders data in Informant you will need to go into the Informant settings, accounts and turn on the calendar app slider and the reminders app slider.

When you are adding/editing/viewing or deleting task and event data that is part of the iOS database (noted as calendar prefixed with iOS for events and iOS Reminders as the save to for tasks) you are directly working with the devices own database. This means that the data is not really a part of Informant and that there is absolutely no sync taking place with Informant. In this configuration Informant is a window over the devices own database any changes are written directly and immediately to the devices own database.

NEW- Device Reminders with locations can now have their locations edited in Informant.

FYI The iOS calendar, contacts, and reminders data is not backed up in the Informant application. Since that data is property of the device recovery of backup data needs to be done at the device level using the devices own backup files and assistance from Apple if necessary.

It is fine to use the device calendar/reminders support alongside the Informant data as the application was made to support that kind of configuration.

When first running Informant if it seems that the application is "automatically" populated with your data there is a very good chance that this data is being shown from the devices own database.

Dropbox-

We are including this in the sync section to hopefully alleviate some confusion. This function is provided as means of backing up the Informant database. Attempting to use this service as a sync service will create a lot of extra work when the Informant sync services will share the data between devices with much greater efficiency.

To access the Dropbox settings inside of Informant please go into the Informant settings and tap advanced, then Dropbox.

When you choose to upload data a snapshot of the Informant database at that very moment is taken, put into a zip file archive and is saved to Dropbox.

To restore use the Dropbox restore option go into the Informant settings, advanced, Dropbox and select the restore option. Once this done please go into Informant settings, advanced and tap the file you wish to restore.

It is an inexpensive way to protect your data by making a daily or weekly backup from Informant to Dropbox.

The Editors-

Overview- The creation and editing of all events and tasks uses an editor. The editors are self explanatory in what information each field holds. As we get into the details of the various views later in this manual some of the special functions that can be accessed from the editor will be discussed where applicable. This section will provide a basic description of the common editor features. The editors for events and tasks are quite similar.

NEW Typing in the title field of an event or task now automatically brings up templates or contacts.

Event Editor-

The event editor is the same for creating events and for editing events. We will cover the geography of the editor to get you familiar. This event editor applies to all views where events can be edited.

To access the event editor from the Calendar View or Today View tap the + symbol at the top left of the view then select event from the menu.

Starting at the top of the editor you will see the following:

Title-The name of the event

Template-Opens the template selection menu and allows a template to be selected and applied. The button resembles a device.

Location-This field is located directly below the title field. Here you can enter an informal location such as "meeting room" or more formal locations like "110 First Street AnyCity, TX 78888" and pretty much any location name in between. Please see the section of this user guide titled "Location, Location, Location" for greater detail on how this feature works and how to use it.

Map Button- Immediately to the right of the location field. This button can be used to search and add locations to your event, it can also be used add or select locations from your locations library.
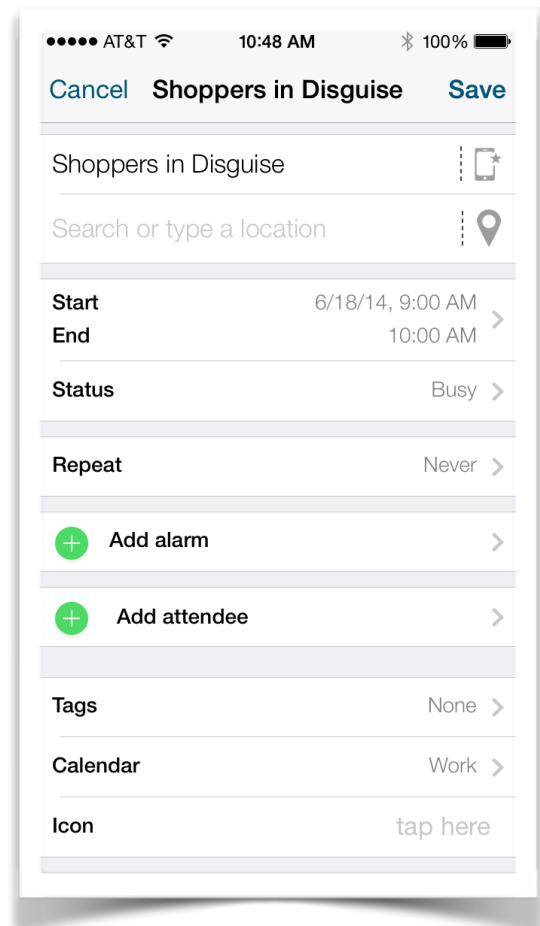
Start/End-Continuing down the editor view. If your event is a timed event you can select a start/end date and time in this field. Tapping the field will open the date and time editor and the time zone selector.

There is an all day slider under the date and time selectors, sliding this to the on position will remove the time selection for the event and it will be considered a 24 hour event.

FYI As part of the time and date selector the far right field is a time zone selector, when you change the time zone and save the event, then view the event details you will see the local time and the time zone time. Once the device is in the timezone that matches the event only one time (local time) will be displayed.

Status-This button will sets the status that you would like to assign to the event

Repeat-This field is where you can set a repeat pattern if you wish to. There are many recurrence options that you can choose from. A button for help with custom recurrences will provide additional information to assist you in creating the exact repeat pattern that you are seeking.

Add Alarm-This field is where you will assign alarms to your event, items assigned to the Informant database will allow for the addition of multiple alarms.

FYI When an alarm is added to an event that is assigned to an iOS or Exchange calendar the alarm will not fire from the Informant application, it will fire from the built in calendar application of the device. Please make sure that if you are using iOS/Exchange Events in Informant that you make sure that in the notification settings of your device that you have all of the notifications turned on for the device calendar.
Failure to do so will result in the alarms not firing.

Add Attendee-Tapping this field will open the contacts list, any contact with an email address can be designated as an attendee. Only contacts with email addresses can be assigned as an attendee.

Upon saving the event you will be given the option to send the event to the attendees, if you choose to send the event it will be emailed through your devices default email account to all attendees and can be added to their calendars.

Tags-In this field you can select an existing tag to assign to the event or you can create a new tag to assign to the event. To create a new tag tap the tags field and enter the name of the tag you wish to create then tap the green plus sign to enter a new tag.

Calendar-This field is where you select the calendar that you want to assign the event to. This is important because the calendar that an event is assigned to determines where the event will be synced to. For example assigning an event to a calendar that is syncing to Google Calendar will allow the event to sync to Google Calendar.

Icon-In this field you can select an icon from the icons library to add to your event, the icon can symbolize anything that you want it to and will make it easy to identify the event at a glance. As you use icons they will be grouped together in the first icon tab for quick access. At this time 3rd part or outside icons cannot be added to Informant.

Sensitivity-This field determines the sensitivity label that is applied to the event. This is only a label and will not affect the visibility of the item.

Comments-In this field you can enter any pertinent comments for the event.

Add URL-In this field you can add web links to your event, they will be clickable when added here.

Attachments-At the bottom of the editor are 3 buttons from left to right you will see a camera button, a photo button and a contacts button.

Tapping the camera button will allow you to take a photo immediately with the device, this photo will then be added to the event as an attachment.

Tapping the photo button opens the devices own photo library and you can choose any of the existing photos to be attached to the event.

Tapping the contacts button will allow you to attach a contact to the event, this is essentially like attaching a business card to the event.

FYI There are some limitations when using the iOS calendars inside of the Informant application. When an event is assigned to an iOS calendar the editor will automatically remove unsupported fields. Tags and icons are not supported and no attachments are supported. If a contact is attached it is moved into the comments section of the event. Attendees are not supported when the event is assigned to the device calendar.

Task Editor-

The task editor is the same for creating task and for editing tasks. We will cover the geography of the editor to get you familiar.

First to access the Task editor please tap the + button from any of the views and select task.

This task editor applies to all views where tasks can be edited. Starting at the top of the editor you will see the following:

Task-Checklist-These buttons are at the very top of the editor and are used to determine if you are going to create a task or a checklist. The editor when checklists are selected will look a little different we will cover that in this section. If you do not see these buttons try pulling the editor down. If your task is assigned to the iOS Reminders in the sync to/save to field then the checklist option will not be available.

Star-Tap to add a star designator to the task. This helps to be able to identify specific tasks at a glance.

Title-This field is located to th right of the Star button and holds the name of the task.

Template-Continuing right the template button looks like a device. It opens the template selection menu and allows a template to be selected and applied.

Location-Situated directly beneath the Title field you can enter an informal location such as "meeting room" or more formal locations like "110 First Street AnyCity, TX 78888" and pretty much any location name in between.

Map Button-This small button to the right of the location field can be used to search and add locations to your task, it can also be used to add or select locations from your locations library.

Start/Due-This field is where you can set the start and due date for your task, and if desired you can add a start and due time. The date fields have two sections, one for
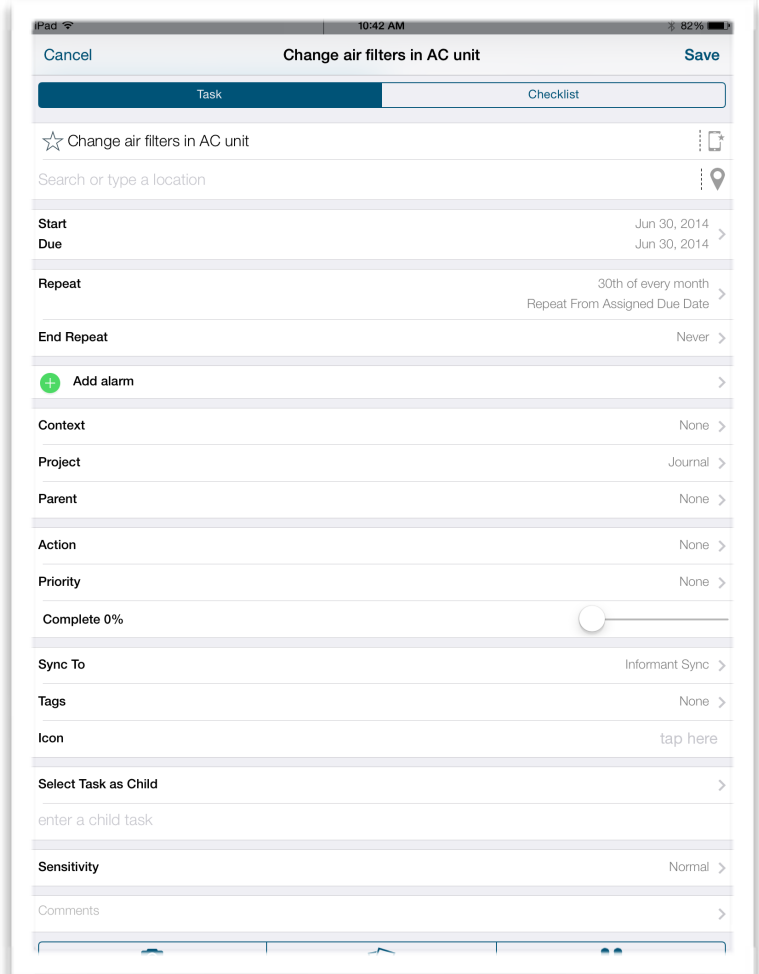
the month date and year and another for the time. If a time is not assigned the time fields will show none.

FYI The sync service that you choose for your tasks is very important as not all sync services for tasks will support all of the options. For example the Google task sync does not sync a start date or time so while you may add those items to the task before syncing, during the sync the information will be removed because the Google Task database does not support that information.

Repeat-This field is where you can set a repeat pattern if you wish to. There are many recurrence options that you can choose from. For help with custom recurrences please tap the button that will allow help for custom recurrences.
Add Alarm-This field is where you will assign alarms to your tasks, items assigned to the Informant database will allow for the addition of multiple alarms. If your task is assigned to the iOS Reminders in the sync to/save to field only one alarm will be allowed.

FYI When an alarm is added to a task that is assigned to the iOS Reminders the alarm will not fire from the Informant application, it will fire from the built in iOS Reminders application of the device. Please make sure that if you are using iOS Reminders in Informant that in the notification settings of your device that you have all of the notifications turned on for the device calendar.
Failure to do so will result in the alarms not firing.

Context-Tapping this field allows you to select a pre existing context or you can create a new context. The most common use for contexts is as an "at"for your tasks. Not really a location but as stated a context some examples would be Grocery Store, Office Meeting, Home, etc.

Project-In this field you can select a project for your task to reside in. You can select an existing project or create a new project. The name "project" can be interchanged with folder as they operate the same. If you have several tasks that are related you can group them into a project. An advantage of using a project is that Informant provides a dashboard that will allow you at a glance to know the status of the project. When creating a new project it is always a good idea to set the next action handling to sequential.

FYI If you are using the iOS Reminders the Projects icons will be different and the properties of the Projects will not be editable.

Parent-This field is used to designate a parent task or to create a new parent task for the task that you are currently creating.

Action-Here is where you set the action handling for the task. This is important if you are using the Getting Things Done task management system or if you manage your

tasks based on their action status. The next action handling is set in Project properties and will be applied to the task when it is assigned to the Project

Priority-You can select and assign a priority for your task in this field.

Complete-This field contains a slider that you can use to set the percentage of the task completion.

Sync To-This element determines where the task will be synced to, tapping it will open the list of compatible sync services that are available for the task.

Tags-In this field you can select an existing tag to assign to the task or you can create a new tag to assign to the task. To create a new tag enter the name that you would like to use in the search field then tap the green + sign to create the tag.

Icon-In this field you can select an icon from the icons library to add to your task, the icon can symbolize anything that you want it to and will make it easy to identify the task at a glance. As you use icons they will show in the first tab of the icon picker for quick and easy selection the next time. At present it is not possible to add additional icons to the icon set.

Select Task As Child-This is where you can designate existing tasks to be subtasks of the task you are currently creating.

enter child task-Tapping here will open up a mini editor that will allow you to create a new subtask or child task to the new task you are in the process of creating.

Sensitivity-This field determines the sensitivity label that is applied to the task. It applies a label only but will not change the visibility of the item.

Comments-In this field you can enter any pertinent comments for the task.

Attachments-At the bottom of the editor are 3 buttons from left to right you will see a camera button, a photo button and a contacts button.

Tapping the camera button will allow you to take a photo immediately with the device, this photo will then be added to the task as an attachment.

Tapping the photo button opens the devices own photo library and you can choose any of the existing photos to be attached to the task.

Tapping the contacts button will allow you to attach a contact to the task, this is essentially like attaching a business card to the event.

FYI There are some limitations when using the iOS Reminders inside of the Informant application. When a task is assigned as an iOS Reminder the editor will automatically

remove unsupported fields. Tags and icons are not supported and no attachments are supported.

Alternate Task Editor-

When selecting the checklist option as you create a new task the fields are changed slightly. Under the start and due date field a new field will be visible.

Enter a checklist item- tapping here will open a keyboard to create a checklist item. You will need to tap the enter checklist item field for each new item that you wish to add to the checklist. Checklist items are just that they are nested inside of task but aren't truly tasks themselves they are single like item elements for example you may create a task called "Grocery List" and for the check list items put things like milk, eggs, bread, juice. Then when you are shopping as you get the items you can check them off until you get them all done then you can complete the task itself. Only Informant Sync is able to sync the checklists all other task sync services will separate out the checklist items and make them standalone tasks.

FYI The task mode that is selected in settings will have a direct effect on what fields are visible in the editor. In the description above it was done in the standard task mode. The Franklin Covey task mode will remove the context field from the editor and will add a field to set the Franklin Covey elements. In the simple task mode many of the fields will be removed to just basic information. Assigning a task to the the iOS Reminders sync to will also alter the editor as the unsupported fields will be removed.

FYI The task editor is customizable, if you see a variance in task elements it may be because the editor has been customized with specific fields removed. We will talk more about this in the settings section.

Views-

The Views are where you will do all of your work in Informant. Here we will explore the views and show you their details.

NEW In the views when an item such as an event is tapped the information is now displayed in a popover style view, this provides greater functionality and ease of use.

NEW At the top of each view is a print button. Tapping this button will open a menu that provides access to the Airdrop, Message, Email, and Printing features. Tapping the print button will open the print dialogue. It is now possible to print tasks in the calendar view as we as any individual task that is in the task view.

Today View-

The Today View is a view that is designed to show you your whole day encapsulated in a single view. You will be able to see your events for the day, any tasks that are due, overdue and in progress. You can also see your notes for the day, and the attendees for any events scheduled that day. For events with specific location information you will also be able to see the ETA information.
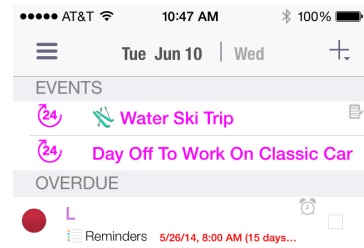
Hamburger Button-. Tapping this button will open a slide out view that shows the day in an hourly grid form with a bar that indicates the current time. This allows you at a glance to know where you are currently in your day. To close the grid swipe the slide out to the left and it will retract.

At the top of the slide out is a button labeled Filter. This is an important feature because it allows you to refine the data that is being shown in the Today View. Using the filter is quite easy.

The filter is split into tasks and events. In the events area of the filter settings, you can filter events by the calendar that they are assigned to or by the tags assigned to them or both calendars and events. To do this tap the pick calendars or pick tags and deselect the items that you do not wish to see in the view at this time. The tasks can be filtered by their tags, again you would tap the tag area for the tasks and deselect the tags you do not wish to see.
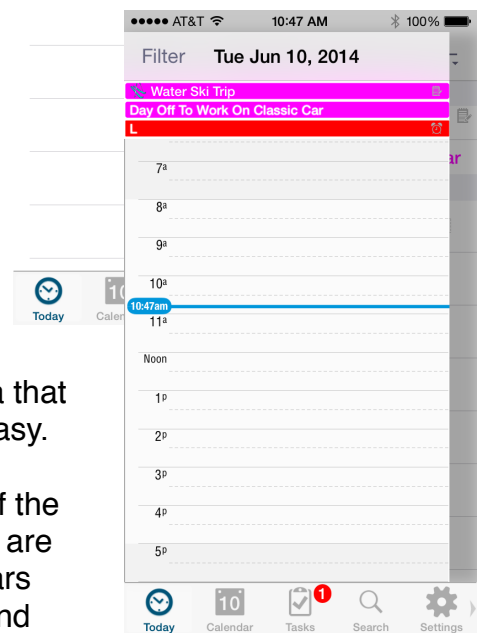
At this point you can go back into the main view and see your filtered results or you can tap the save filter button. Saving the filter makes it a filter template that you can call up

later if you wish to re-apply the same filter to this or other calendar views. To recall a saved filter just select the saved filter of your choice in the saved filters area of the filter dialogue..

Once the filter is set you can tap the main view to get back into the Today View.

Today Tomorrow Button-Moving right at the top of the page you will see two buttons with dates on them. Todays date and Tomorrows date. The Today View of course defaults to today but by tapping tomorrows date you can preview what the Today View will look like tomorrow.

Add Button-Continuing across the top row of the Today View moving right is the Add button, it looks like a plus sign. Tapping this button will open the add menu, selecting task will immediately open the task editor. This will be where you create the new task. . If the task is set to start or end on a date that is other than today the saved task will not be visible in the Today View for obvious reasons but you will be able to view the task in the main Task View.

Weather Field-If you have added the weather function to Informant the weather will show on the second line of the view directly below the button row mentioned above. Tapping the weather will show a detailed view of the weather with a forecast for the day. To exit the detailed weather view tap the main view.

NEW If the event has location information and you are using the weather option the weather for the location of that event will be displayed.

Events-Below the weather field is the list of events. You will be able to see the event times, titles and if configured to do so you can see detail icons that will show the alarm status, recurrence status, notes status and other items providing an at a glance method of knowing the event details. (See the Appearance settings Event Task Notes Layout settings to activate the detail icons)

If you tap an event you will be shown the event details. The information in the event detail can be scrolled up or down if needed.
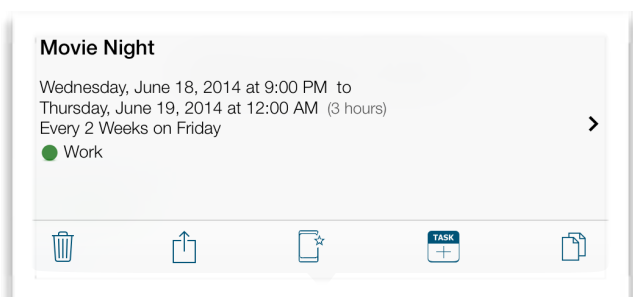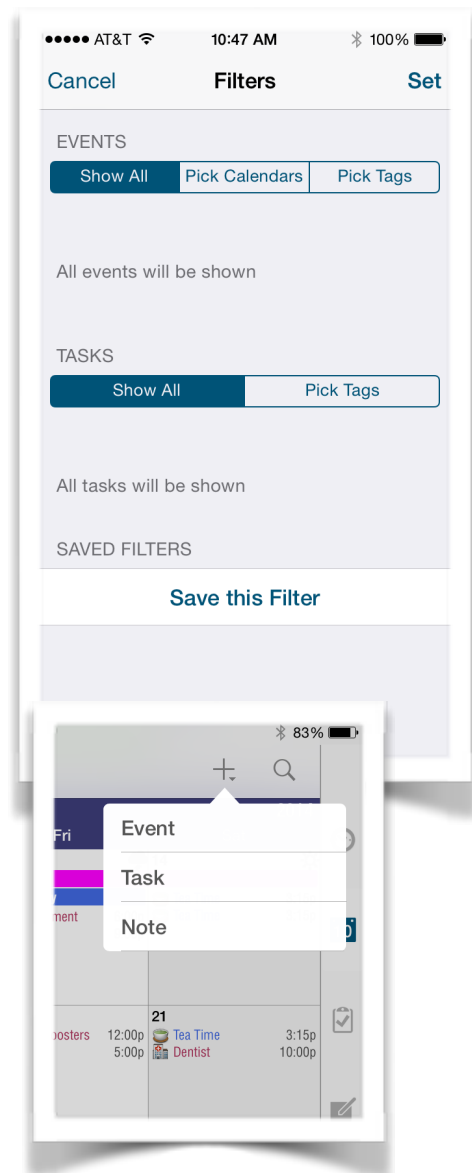
In the event detail tapping the arrow button at the right will open the event editor allowing full editing of the event.

Along the bottom of the event detail view are some buttons-

Trash Can Button-Tap this to delete the event that you are viewing.

Action Button-Tapping this button provides access to share the event via AirDrop, Message, Mail or Print.

Template Button-Tapping this button will take the event that you are viewing and create a template based on the event.

Convert To Task-Tapping this button will open up the task editor and allow you to create a new task from the event that you are viewing.

Duplicate Button-This button looks like two sheets of paper. Tapping it will create a duplicate of the event being viewed and will open the editor for the copied event allow you to make any edits that are needed.

Tapping the main view will close the event detail and return you to the main Today View.

Tasks-Below the events you will see the tasks. Tasks shown will be tasks starting today, tasks that are overdue and tasks that are in progress.

If you tap a task you will be shown its details. The information in the task detail can be scrolled up or down if needed. The types of tasks shown in the Today View can be configured in the Today Settings. This description is generalized and what you see in your Today View may vary depending on how you have the view configured.

In the task detail view tapping the right pointing arrow will open the task editor allowing you to make changes.

Along the bottom of the task detail view are some buttons-

Trash Can Button-Tap this to delete the task that you are viewing.

Action Button-Tapping this button provides access to share the event via AirDrop, Message, Mail or Print.

Complete Button-Use this button if you want to mark the task as complete.

Duplicate Button-This button looks like two sheets of paper. Tapping it will create a duplicate of the task being viewed and will open the editor for the copied task to allow you to make any edits that are needed.

More Button-A tap of this button will open a sub menu that will allow you to convert the task to a project, an event, template or email the task.

Tapping cancel will close the task detail and return you to the task detail view, tapping outside of the task detail will return to the main Today View.

Meeting Attendees-Continuing below the tasks are the meeting attendees. Any event scheduled for today that has an attendee will show the attendees and just below their name is the title of the event that they will be attending. Tapping an attendee will show that attendees contact details. It is possible from this view to tap the phone number of the attendee to place a call (if your device supports that).

Notes-Any notes that were created today will be shown in the notes section. Tapping a note will open up the notes editor allowing you to work with the note to add, edit and delete per the normal notes editor operation. (See Notes View for Notes editor details)

Alarms-At the bottom of the Today View are the alarms for the day, these can be for tasks or events. Tapping an alarm will show you the detail of the event or task the alarm is assigned to with same buttons as mentioned above.

The Today View can be customer configured in the Informant settings to show as much as little information as you would like. We will cover these settings in detail under the Settings View section of this users guide.

FYI There is no change in operation when viewing the Today View in the landscape mode on the iPhone.

Calendar View-

This is the most commonly used view in the application. You can view events,tasks, and notes pinned to dates on the calendar. The Calendar View is it is divided up into four separate sub views.

FYI Double tapping the calendar icon will open the jump to date menu where you can select a specific date for Informant to "jump" to. For iPad users this replaced the former left side date selector pane and the date selector slide out on the iPhone.

Those views are as follows-

Month View-

This view shows the entire month and can be scrolled into the past or future with an up or down swiping gesture. Tapping a date on the calendar will highlight the selected day and show a summary view of the items for that day, tapping an item will show its details.

NEW The details view of the month is now shown at the bottom of the Month View screen allowing the Month View itself to be scrolled up and down while viewing the details of a specific day.
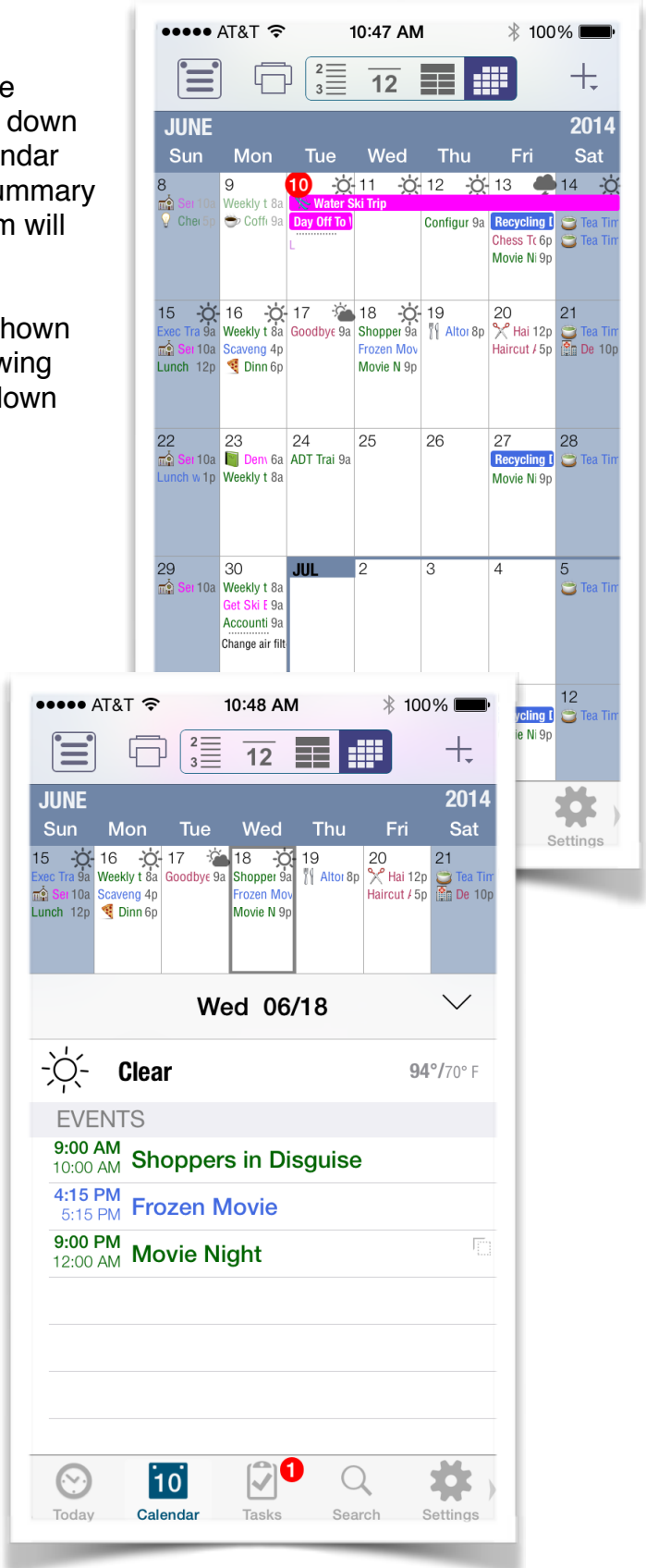
Week View-

This view can be configured to show a 5 day work week, or a 7 day standard week. You can scroll back or forward through the weeks with a left or right swiping motion. Tapping an item will open a summary view for the day, tapping the specific item from the summary view will present that items details. Tapping an item in the Week View in the iPad will bypass the summary view and go directly into the item details.

Day(s) View-

This view is a grid style view that has a time bar that drops through the day indicating the time of day so that you can see at a glance how that relates to your schedule. This view can be configured to show as little as one day or it can show many days up to ten. This is adjusted by using a horizontal pinching gesture in or out to add or remove days. The size of the hours grid can be adjusted with a vertical pinching gesture. In this view events can have their times edited by dragging them around the view.

List (Agenda) View-

This view is very similar in its behavior to the Today View. It scrolls up and down to move to the past and future and tapping on an item will show that items details. To view events that are previous to the current events being shown tap the previous events button at the top of the view and you will be able to scroll through them.

The following are common features among all of the Calendar Views. Starting at the top left you will see the filter button. Tapping it opens the filter menu. Using the filter options you can customize the calendar views to show only specific data such as certain calendars or items with specific tags. Once you have selected the filter options tap the save filters button to add and apply the filter. Once
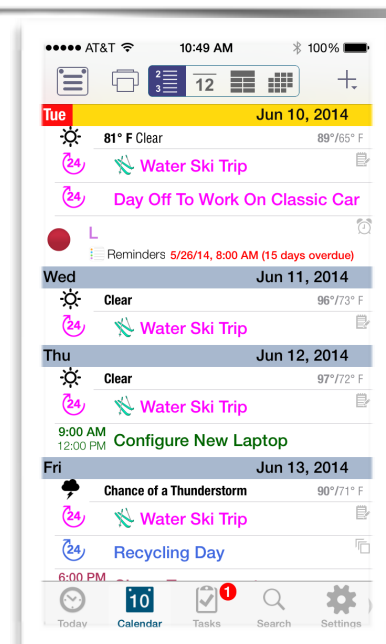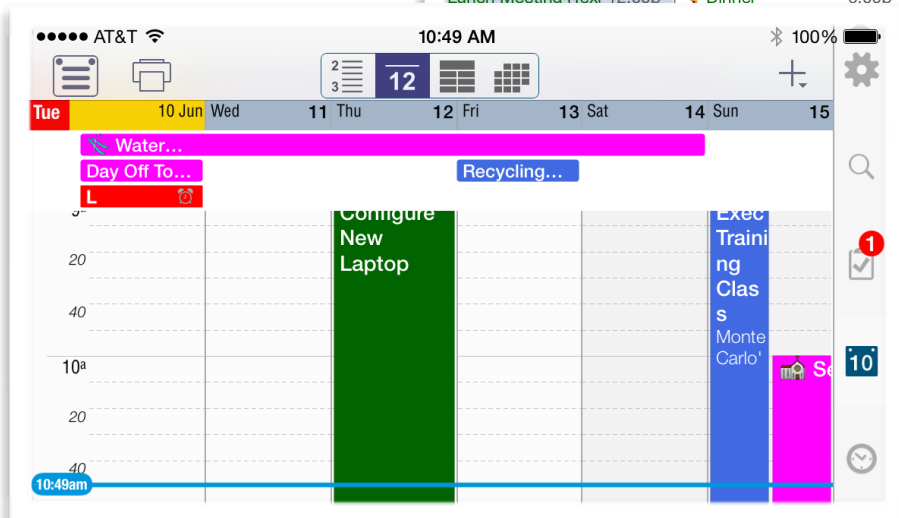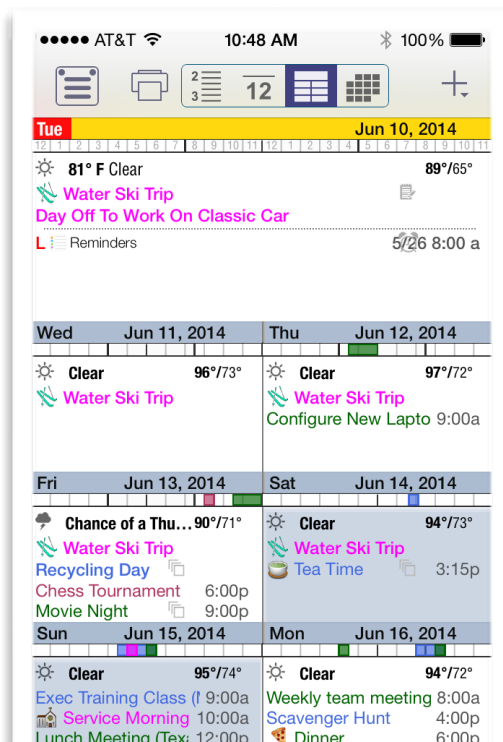
saved the filter can be applied on to each of the Calendar Views and the Today View.

To the right of the filter button is the print button. Tapping this button will open a menu that allows you to set the range of the data that you wish to print.

To the right of the Print button along the top row of the view are the four buttons that control the selection of the Calendar Views.

From right to left the buttons are as follows; Month View, Week View, Day(s) View, List (Agenda) View. Tapping a button will open the corresponding Calendar View Continuing further to the right you will see a plus button. This button allows you to add an event, task, or note from any of the Calendar Views. Tapping it will open a submenu where you can choose the item that you wish to create by tapping on it. The appropriate editor will be opened and you can create the item as normal. Tasks created in this way will override the default task settings if the no date option is set as the default the task will be assigned to the specific day. Notes created in the calendar view will be pinned to the selected date.

FYI iPad On the iPad there is one more button, it is a magnifying glass which indicates the search function. Tapping this button will open the search screen and allow you to search Informant for specific items.
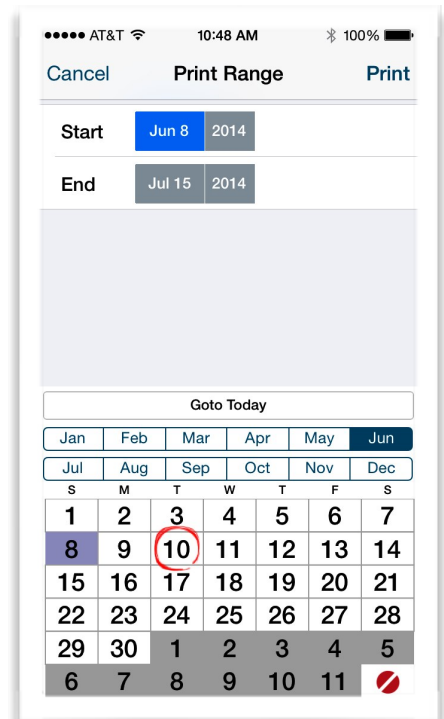
Task View-

Behind the Calendar View for popularity is the Task View. This view is likely the most powerful view in the application and the most complex. Before detailing this view there are some factors that you need to be aware of when using the Task View;

The task mode, sync to settings, and editor features settings can all have a bearing on the way the Task View might look. For example the Simple task mode removes fields from view, if you have the sync settings set to iOS Reminders the fields that the iOS Reminders database cannot support are removed. In the standard task mode or the Franklin Covey task mode the editor can be set up via the Informant Task Settings to remove certain task editor fields that you may not use.

For the description in this guide the settings will be Standard task mode, with all of the fields set to on, and the task sync to/save to field set to none.

When viewing the Task View the first button that you will see in the top left of the view is the "Hamburger" button (iPhone only). As in other views in Informant tapping it will open a slide out submenu.

At the top left of the submenu (left pane of the iPad) is the filter button. If no filter is in use this button will show as "Filter", if you are filtering the Task View the button will show as "Filtering".

A little further to the right of the Tasks label but still at the top of the slide out submenu or left side pane is the print button.   Tapping this button will open a menu that provides access to the Airdrop, Message, Email, and Printing features. Tapping the print button will open the print dialogue.

NEW In the task view detail the "Priority Pill" color bubble has been replaced with a color bar at the left of the task.
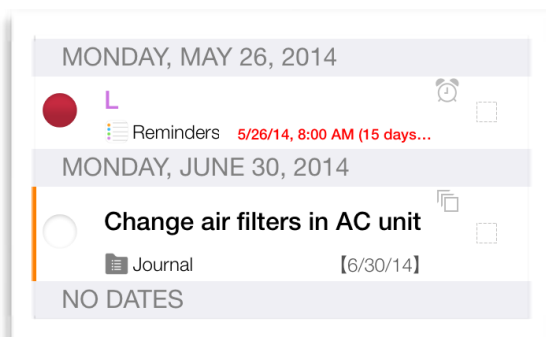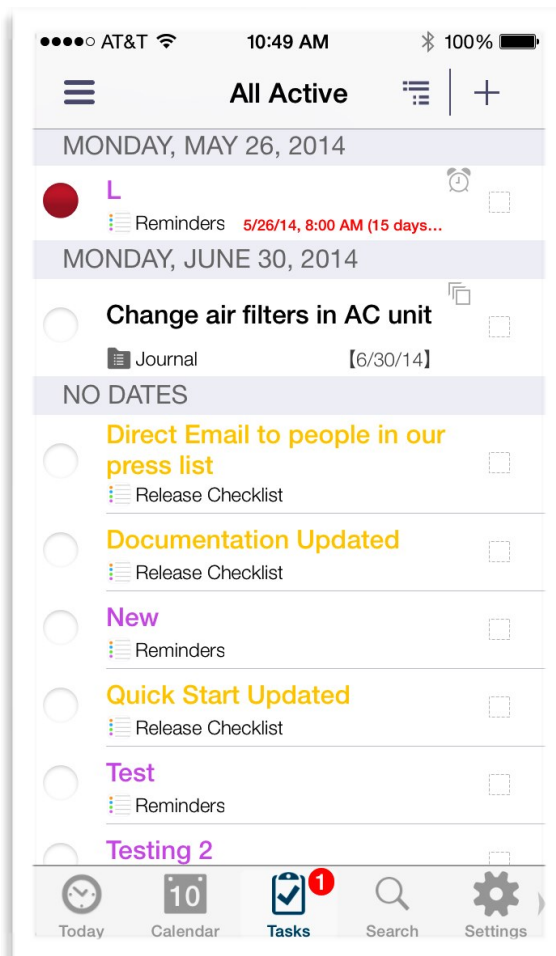
NEW The multi-select button can be turned on or off in the task settings. By default it is turned off.

At the right edge of the slide out submenu or left side pane is the edit button.

Tapping the edit button will allow you to determine what items are visible in the slide out menu. If you tap the edit button then tap the red dash next to one of the elements a hide button will be visible, tapping it will hide that item from view once you tap the done button. To bring the item back into view repeat the above steps but tap the green plus button to restore the item into view.

The Task View is split into several different viewing options. The first section is the groups, followed by filters (not the same as the view filter we discussed earlier) with the Smart Filters being shown at the bottom of the submenu/left side pane. We will discuss each in detail below. When viewing the submenu you may see numbers to the right of the field names, this indicates the total number of tasks in that element. If you see two numbers one gray and one blue, that means that you have a tag filter active and the blue number indicates how many items are being filtered out of view in the item.

The groups are collections of tasks with commonalities and they are listed as follows;

Inbox-This is a collection area for tasks that have been created but have not yet been processed. Once a task is out of the Inbox it can't go back in to it.

Projects-Tapping this filter will show you the list of projects (folders) that you are using. If you tap the edit button here when the Projects view is expanded you can select a project and edit that specific projects properties and tap done to save the changes.

If you tap a project you will be shown all of the tasks inside of that project as well as a dashboard that will give you up to the second statistics on the project.
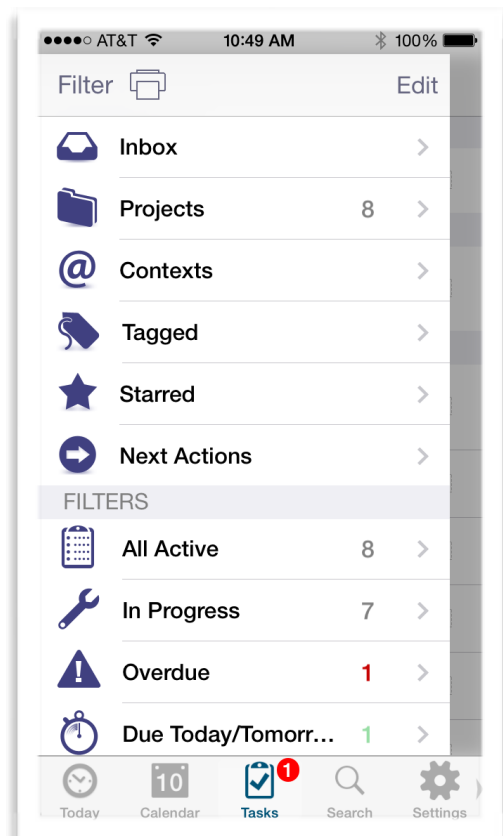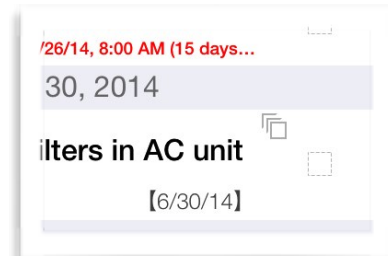
New Projects can be added by tapping the edit button and tapping the add button, projects can be deleted in the same manner by tapping the edit button and tapping the red dash next to the project name.

FYI iOS Reminders Lists show as projects in the Informant application. iOS Reminders based projects will have a slightly different icon and will not be able to be edited like the Informant projects are.

FYI Google Task lists are shown as Projects in Informant.

FYI For the best GTD support at the time of project creation you will want to set the next action handling to sequential.

FYI With the standard and Franklin Covey task modes and the projects set to sequential you can drag and arrange the tasks inside of a project to any order that you would like.

Contexts-This field is another method of grouping and identifying tasks. Often the context is used as a location for the tasks. For example if I had a context called school, then I would know the tasks with that context would be taking place at or be associated with the school. When you create a context you can apply a specific address and get an alert from Informant when you are near that location.

Contexts are not available in the Simple task mode or when a task is assigned to the iOS Reminders.

Contexts are managed in the Task View by opening the contexts view and tapping the edit button then selecting the specific context that you wish to edit. Just like the projects the contexts have their own sync to property. If the task sync to is to does not match the context sync to the task will sync without the context attached to it.

FYI If a task is assigned to the iOS Reminders the context field will not be available in the editor. If a context is assigned to a task then that task is assigned to the iOS Reminders the context will be removed.

FYI If you are using the simple task mode the use of the context field is not supported.

Tagged-Tags can be attached to a task to provide a unique identifier, tags are also what the Task View filter uses for the filtering criteria. You can assign as many tags to a task as you wish.

Tags sync automatically to the sync services that support them.

Tags can be managed in this view by tapping the edit button at the top of the submenu and selecting a specific tag to edit or delete.

FYI Tags are not available when your tasks are assigned to the iOS Reminders.

FYI Tags are not available when the simple task mode is in use.

Starred-Tasks can be starred to make them easy to identify and correlate to whatever responsibility you give to it. The star element can be toggled on or off by tapping the star when viewing a task.

The starred element will sync automatically to the sync services that support it.

FYI Stars are not available when your tasks are assigned to the iOS Reminders.

Next Actions-This grouping provides a count of all the tasks that are active and have a next action assigned to them. Tapping into the group will show you a count for each next action that has a task assigned to it.

Next actions will sync to the sync services that support them.

FYI Next actions are not available if your task is assigned to the iOS Reminders.

FYI Next actions are not available when using the simple task mode.
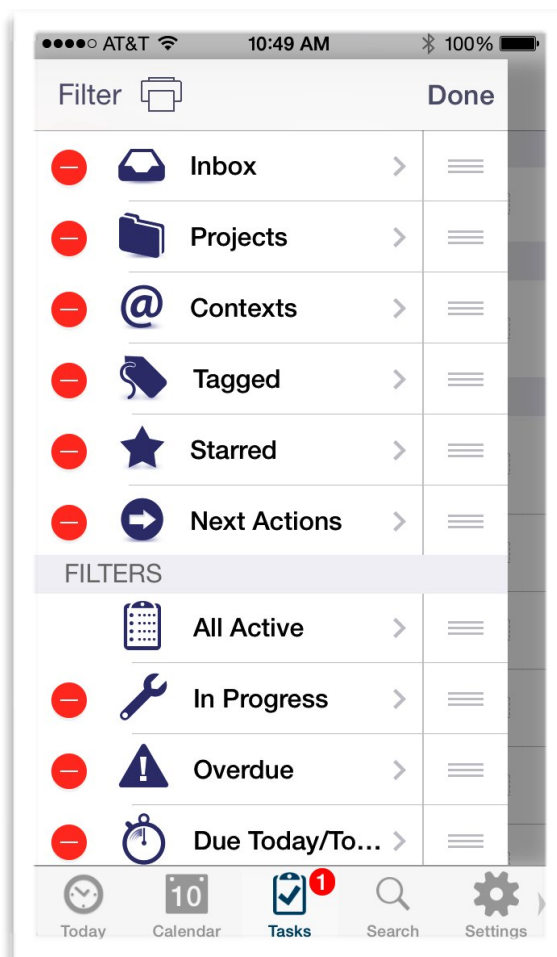
Moving down the submenu to the next section you will see a heading called Filters. The filters section shows the tasks organized by their elements such as due date, status, comments etc. Each filter will have a count showing any tasks that meet its criteria. Tapping the filter will show all of the tasks that are being filtered. The filters are divided up as follows.

Evernote Reminders (Optional)-If you are syncing Informant with Evernote this filter will be added to the list in Informant to make it easy to identify the Evernote Reminders quickly.

All Active-This filter is very basic it shows all tasks that are active without any other elements being filtered on. This filter should have the highest task count.

In Progress-All of the tasks that are in progress will be shown here, the difference between in progress and all active is that tasks that have not started yet are part of the all active count while the in progress filter shows only the tasks that have started.

Overdue-Tap this filter to see all of your tasks that are overdue, thew will collect here until they are processed or updated.

Due Today/Tomorrow-This is a very handy filter as it shows the tasks that are due today and that will be due tomorrow. Tasks beyond tomorrow or previous to today are not shown in this filter.

Undated-If you have tasks that have no start date or due date you can view those tasks in this filter.

Completed Today-Tasks that were completed today can be viewed in this filter with a single touch. At midnight on the device this filter is cleared for the new day.

Tasks With Comments-You may have included important details in the comments section of your task, with this filter you can see the tasks that meet that criteria and view them with one touch.

Completed-This filter is a storehouse for all of your completed tasks. This filter can sometimes get users in trouble as many years of completed tasks will accumulate and inflate the database to a size so big that Informant performance will suffer. It is a good idea to go into this filter on a regular basis pull the view down which will reveal a delete button, this will clear the completed filter and keep the Informant database smaller which will keep the application performance where it should be.

Further down the submenu the next section you will see is called Smart Filters. The Smart Filters section shows the tasks organized by the Smart Filters that you have created. Each Smart Filter will have a count showing if any task meet its criteria, tapping the Smart Filter will show all of the tasks that are being filtered.

Smart Filters are user defined filters each one can have as few as one rule or as many as you would like. The more rules added to the filter the more granular its results will be.

There are thousands of different Smart Filter configurations. We suggest trying them out in various combinations. If you get a Smart Filter or rule that you don't wish to have just delete them or edit them. Tapping the "i" button opens the Smart Filter creation screen.

FYI Smart filters will sync only when using Informant Online as your task sync service.

In the main partof the Task View (on iPhone when the slide out menu is hidden, or the right side pane on the iPad) t you will see the name of the specific task view that you are looking at e.g.: Next actions, Completed etc.

Continuing further to the right you will see a button that looks like some lines with the lower lines indented.This is sort control for the view that you have selected. Tapping this will open a sort menu comprised of the following sort options. Tapping an option will sort the view that way. Double tapping a sort element will change between ascending and descending, an arrow indicator will show which direction the items are sorted in.

NEW The task view can now be sorted by the due date

None-No sorting at all will be applied to the view

Progress-The view will be sorted by the tasks progress.

Start Date-Tasks will be sorted according to their start date

Due Date-Tasks will be sorted according to their due date

Completed Date-Tasks will be sorted according to their completion date

Action-Task will display grouped by their next action

Priority-The task priority will be used to order the tasks in the view

Context-The context field of the task will be used for the sort order

Sync To-The tasks will be grouped by their sync to setting

Tag-Tasks will be presented grouped by their specific tags

Project-The tasks will be presented in Project order

Title-The tasks will be sorted and presented by their title

To the immediate right of the sort button is the add button it will look like a plus sign. Tap the plus sign to create a new task. The task editor will immediately open.
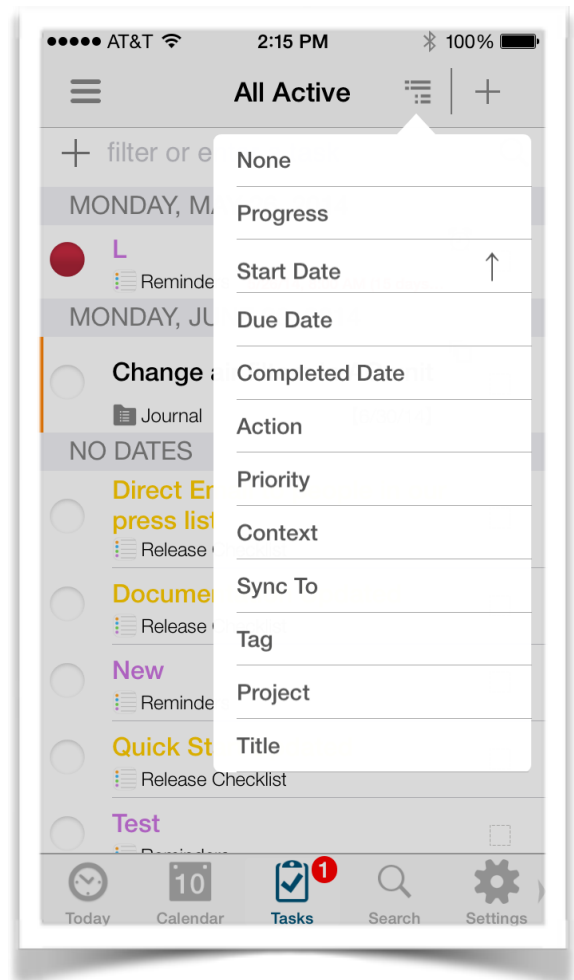
Notes View-

This view is covers the built in notes application. Notes can be typed in, synced in from Toodledo, Evernote, Informant Sync or they can be voice recordings. At this time recorded notes are not able to be transcribed.

FYI iOS Notes cannot be integrated at this time due to developmental restrictions that prevent developers from being able to access the iOS notes database on the device.

Starting at the top left is the Hamburger Button (iPhone only for iPad this is the left pane). Tapping this will open the slide out menu.

In the slide out submenu or left pane the first button you will see is the filter button, when a filter is active this will show as filtering. Tapping it will open the filter options. All filtering of the notes is done by tags. The filters can be used to hide specific text notes from view..

Moving right of the filter button you will see the edit button, tapping this edit button opens up editing options for the submenu/left side pane, items can be re-arranged, hidden, or by tapping one of the items you can edit its properties.

Down the side of the slide out pane you will see the following items.

Notebooks-This is the list of notebooks that are available for you to use, you can add notebooks, delete notebooks, or tap a notebook to open and view its contents. Tapping a specific note in a notebook will open that note in the main view where you can view, edit or delete the note itself.

Tagged-Text notes can have a tag applied to them. This tag can be used for sorting the
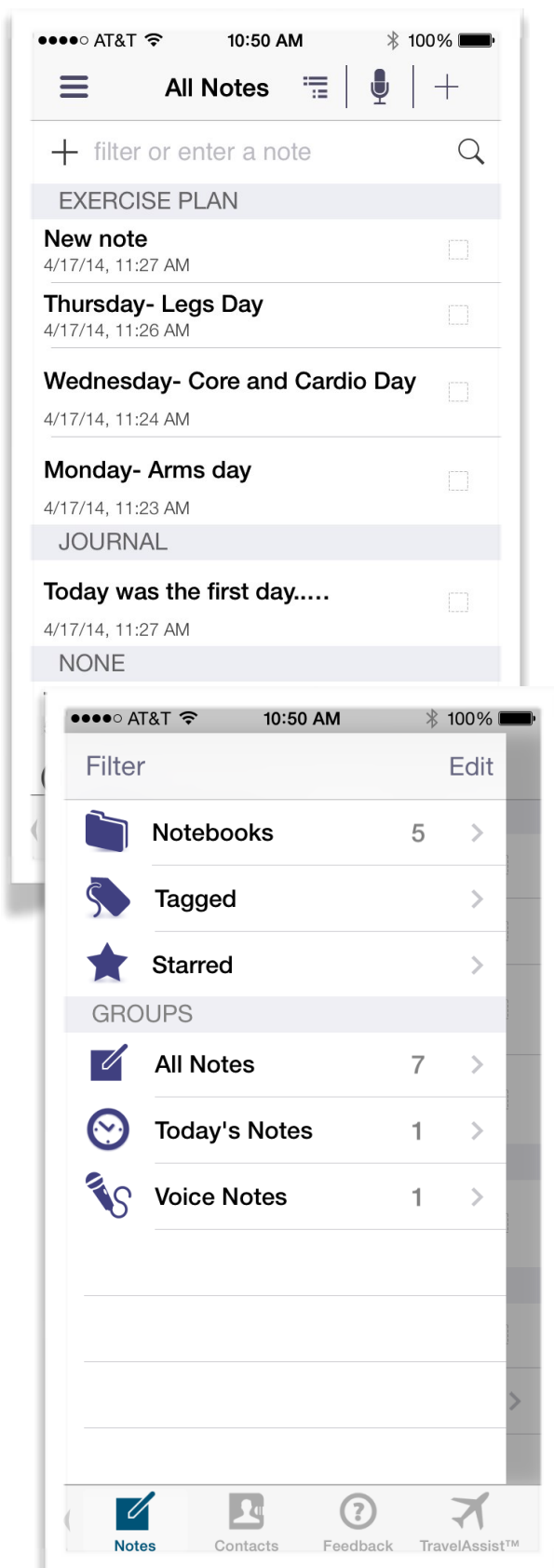
notes, for quick identification of the notes or to give notes a specific color. Tapping here will show you a list of tagged text notes. Tapping a specific note will open that note in the main view.

Starred-Text notes can have a star applied to them which makes them easy to identify and call out. Tapping this group will show all of the notes that have a star next to them. Tapping a note here will open it in the main view.

Below the built in filters (Notebooks, Tagged, Starred) are the Groups. They are broken out as follows;

All Notes-This grouping when tapped will show all of the notes that are currently in Informant. Voice notes and Text notes are shown here. Tapping a note will open it in the main view. If the note is a voice note the dialogue to play the note will be shown.

Todays Notes-Notes that were created in the current calendar day will be grouped here, this includes voice notes and text notes. Tapping a note will open it in the main view. If the note is a voice note the dialogue to play the note will be shown.

Voice Notes-This is a grouping of all voice notes. Tapping a note here will show you its details and will offer an option to listen to the note.

Moving back up to the main Notes View (right side pane on the iPad) at the top you will see the name indicating what area of the Notes View that you are looking at.

At the right of the view name is the sort button. Notes can be sorted by the following elements (double tapping an element shifts between ascending and descending order)

None- No sorting, notes appear in random order

Last Modified- Notes are sorted based on the date they were last modified

Created- Notes are displayed and sorted based on their creation dates
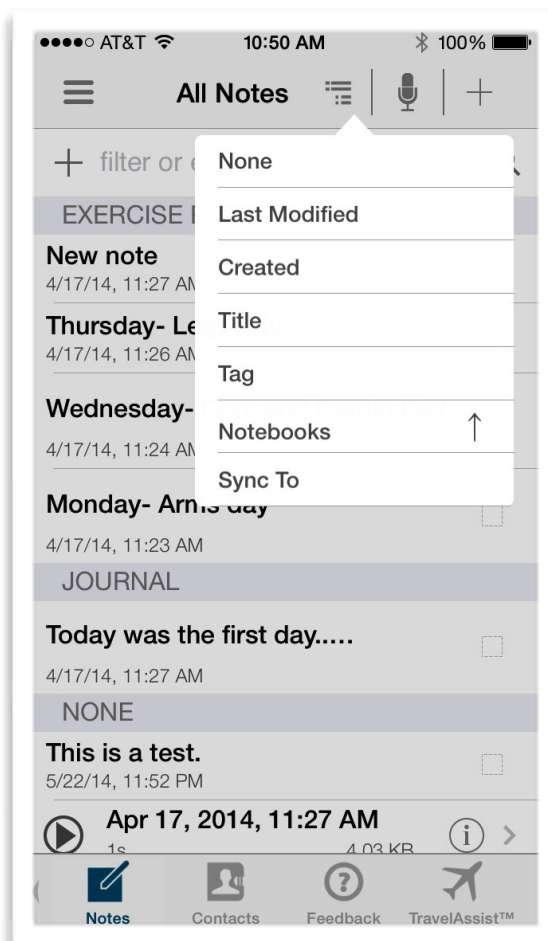
Title- Notes are shown sorted by their title

Tag- The order of the notes will be alphabetic by the tag name

Notebooks- This will sort the notes by the notebook that they are assigned to

Sync To- The sort element is the sync service that the note is assigned to

To the right of the sort button is the voice note button, it looks like a microphone.

Tapping it will open the voice recording view and will start immediately start recording.

At the bottom of the record screen are three control buttons.

Delete-To delete the current recording.

Pause-To pause the current recoding.

Save-To save the current recording.

Once the recording is saved it will show in the All Notes and Voice Notes groupings.

In the list the play button is the left most button and looks like a play button inside of a circle.

Swiping left to right across the voice note title will open a delete button. Tap the delete button to delete the selected recording.

To the far right of the title is a circle with an italicized "i" in it. Tapping that will open the voice recording properties. In this screen you can edit the title field by tapping it, you can see the created date file format, file size, and you can add a short text note.

At the top left of the information screen is an envelope icon, tap that to email the voice note. At the right is a done button. Tap that to back up one level and save any changes that you have made.

Back at the top of the main Notes View to the right of the voice notes microphone is a "+" button. Tap that to add a text note.

In the text note editor at the top left you will see a button that serves as a back button to your previous view, this is also the save button. Backing out of the editor saves the note.

The note will be titled by default with the first typed line that it contains.

Continuing across the top of the note editor and moving right at the center is the note title, further to the right is a trash can icon, tapping that will delete the note.

To the right of that is an action button with an up arrow. Tap that to share the note via AirDrop, messaging, email or printing.

The next button is a circle with an italicized "i". Tap this to see the notes properties. In this screen you can add a star to the note, set the sync to service, assign the note to a notebook, assign tags and icons and even assign a pin to date so that the note will show up in the calendar.

Tap the save button at the top right of the view to save your changes and go back out to the notes editor. Or tap the cancel button to return to the main notes view.

Down at the bottom of the view is the keyboard, it is a standard iOS keyboard with a strip of buttons along the top.

Each of the buttons serves a specific duty with most being formatting options.

To the right of the fill button is a button that looks like two papers on top of each other. this button allows you to attach photos from the device camera roll to the note.

This formatting bar can be scrolled left to right see more formatting options.

This view has two search magnifiers. The top one is for searching the whole application while the lower (smaller) one is just for searching inside of the Notes View.

FYI Only Informant Online can sync the voice notes.
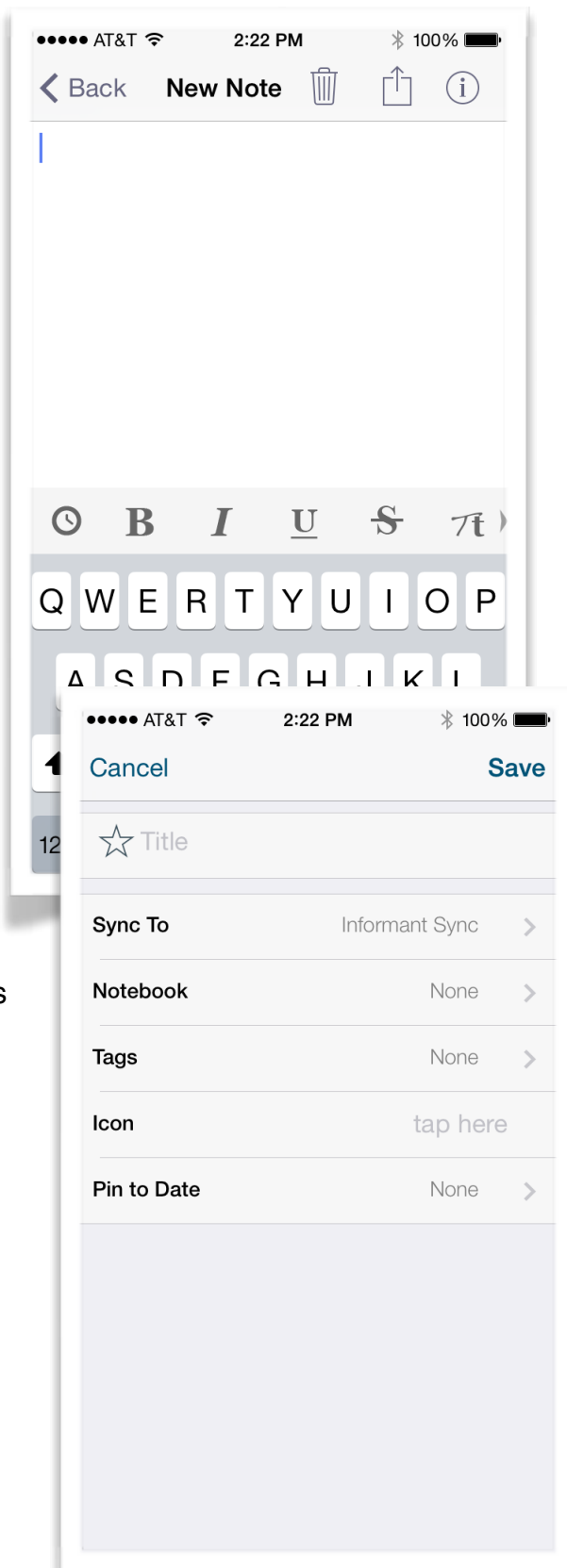
FYI For text notes to sync you must set a sync service in their sync to field

FYI Note attachments can be synced via Informant Sync or Evernote

Contacts View-

In the contacts view you to view, edit, add, delete, attach, and invite contacts. The view displays the contacts from the devices own contacts database. Informant itself does not sync the contacts or manage the database. The device itself does that. Any changes made by Informant to the contacts have to be initiated by the user.

Starting at the top left of the view on the iPhone you will see the hamburger button tapping this will open the slide out submenu. On the iPad the left side pane is equal to the slide out submenu of the iPhone

On the slide out menu or left side pane. At the top right you will see a "+" button. Tapping this button will allow you to create a new contacts group.

Below that you will see the All Contacts group, this is the main group of contacts and contains all of the contacts that exist in the contacts database. Tapping this group will display the contacts in the main display of the view.

Under the all contacts group is a header titled Contact Groups, here all of the contact groups that have been created either in Informant or the devices own contacts application will be listed.

Tapping any of the group names will show the contents of that group in the main contacts view area.

Swiping from right to left over a group name will produce a delete button that if tapped will delete the group but it will not delete the contacts contained in that group.

Deleting a group in Informant will remove the group from Informant and the devices own contacts application.

To the right of the contact groups header is a faint "+" sign, tapping this will also give you the option of creating a new group.

In the main contacts view (right side pane of iPad) the name of the contacts list that you are currently looking at will be shown.

To the right of that is the sort button it looks like two long lines and two short lines stacked on each other. When you tap this button you can sort the contacts by the following elements which is how they will be displayed in the view;

None-This selection will let the contact list go to its default sorting, which is by the last name of the contact, if no contact is present then by the business name.

Company- This option presents the contacts in the database by their business name, contacts without a business name are shown at the bottom of the list sorted by the contact name.

Contact Groups- When used this setting will present each contact group in order at the same time. Contact groups beginning with A are shown at the top and descend accordingly. All of the contacts for the groups are displayed under the group header.

Pictures- If you have a lot of contacts with photos attached to them you can use this sort to see the contacts sorted by the contacts name alphabetically shown with their photo. Contacts without a photo will be not be shown in this sort.

To the right of the sort button is the "+" button tapping this will open the editor to add a new contact. Adding a contact in Informant will also add that contact to the devices own contacts database. To the right of that is the search button to search the whole application.

Tapping a contact will show that contacts details, if your device is capable, tapping a phone number will call the contact, tapping an email will open the email dialogue.

At the top right of the contact detail view is an edit button, tap that to open the editor and make changes to the contact.

Swiping a contact from left to right opens a submenu that from right to left has the following options;

New Event- Use this button to add a new event using the contacts name as the event title. This will open then event editor and you can set up the event as you wish.

All Contacts Screenshots are from the iPhone

New Task- A tap on this button will create a new task using the task defaults that you have set in the task settings, the task will have the contacts name for its title. The task editor will be open so that you can make any edits to the task that you like.

Group Settings- This button will open the group settings for the selected contact. Check or un-check the groups that you want to have the contact in. Again any changes here will be reflected in Informant and in the devices own contacts application.

Email Contact- Tap here to share the selected contact via email, An email dialogue will open and you can select the recipients of the information.

Delete Contact- The most self explanatory button of the group, tap here to delete the contact that you have selected. Once deleted the contact will not be able to be recovered and the change will be reflected in the devices own contacts database.

To the right of the contacts list is an alphabetic index. Tapping a letter in that index will jump to that place in the alphabet and will show you the contacts that are listed there.

Settings View-

   In the Settings View it is possible to customize Informant to your specific tastes and needs. Informant is so flexible that it is sometimes easy to get lost in the settings and all that can be adjusted. Our advice is to use the application for a while with the stock settings then change the items that you wish to. Feel free to experiment with different combinations of settings.

There are a million or more different combinations of settings that can be used in Informant. Obviously we are not going to cover all of those items here. This section will provide a breakout of settings divisions, and provide a basic explanation of each setting. If you need more information regarding a specific setting or combination please check our comprehensive knowledge base and our forums. The forums are a great place to discuss your questions with other users. If you are unable to find an answer to your question contact our support department and they will be happy to assist you with your specific questions.

At the top left on the iPhone is the hamburger button. Tapping this will open a slide out submenu for the settings. On the iPad the left side pane will match the the slide out submenu of the iPhone.

At the top left of the slide out or on the left side pane is the version number. A letter may follow the version number if have the Premium upgrade you should see the letter "P". This is important information when you submit a support request.
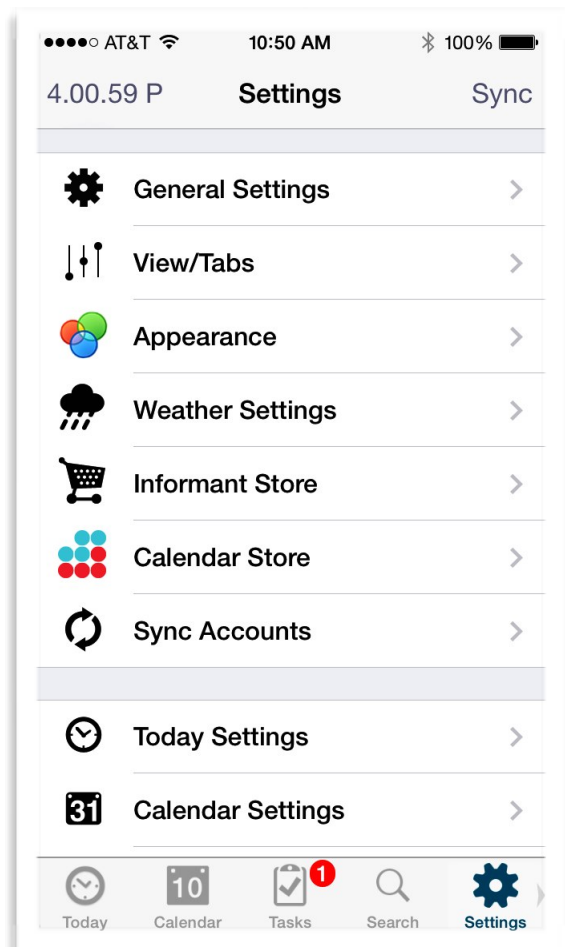
At the right side top of the slide out/left pane is a sync button. If you have any active sync services, tapping this button will start a sync operation.

Going down the left side there the 20 settings categories as follows;

General Settings-The General Settings cover the items that are general in relation to the application, most settings here are global to the application.These items are shown below with a brief explanation of each.

Application Badge- This setting determines what the number shown over the icon, in the main device screen, indicates. Things like overdue tasks, the current date and many others.

Meeting Organizer- This setting is used to define the contact that will be used when you create a meeting and send it to others. In most cases you will want to select your name from the contacts list as the owner of Informant but you can use any name in your contacts list to be assigned as the meeting organizer.

Set **Passcode**- You can set a 4 digit pass code for the Informant application that will secure the application in the event someone besides yourself gets access to your device. If you desire to remove the passcode open up this setting and tap the clear button, this will remove the passcode.

SmartTitle Autocomplete- This setting toggles the auto complete feature for the titles of your tasks and events. Moving the slider to the on position will allow Informant to autocomplete the titles of your items.

Capitalize Words- Moving this slider to on will capitalize all words in the task and event titles. This option will not work with 3rd party software such as Fleksy or external keyboards.
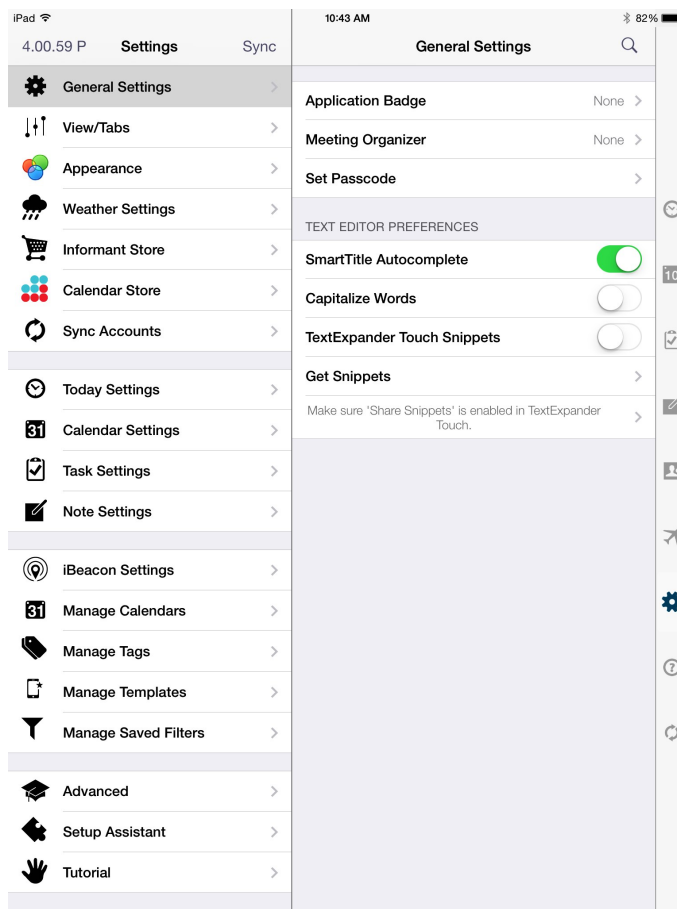
Text Expander Snippets- If you are a user of Text Expander you can turn on this setting to use your snippets in the event and task comments area.

Get Snippets- If you are a Text Expander user you will need to tap this button to load your snippets into Informant.

View/Tabs- To navigate between the various Informant views there are buttons referred to as tabs. On the iPad they run down the right side of the view. On the iPhone they run along the bottom of the view in a strip that can be scrolled left and right. View/Tab settings are listed and briefly explained below.

Today View-Feedback View- Turning these sliders on will make those tabs viewable in the tab bar. To the right of the slider is a small 3 bar button, if you tap an hold that button the tab can be moved to a different place in the list and the tab bar will reflect this order. Moving any of the sliders to the off position will remove that button from the tab bar.

Portrait/Landscape- These settings control the size of the tab buttons, there are three sizes to suit all customers needs. Users can also set the landscape orientation size of the tabs to be different from their portrait orientation size. The three available options are icon only, icon and text, text only.

Reset- Tapping this button will reset all values to the default settings.
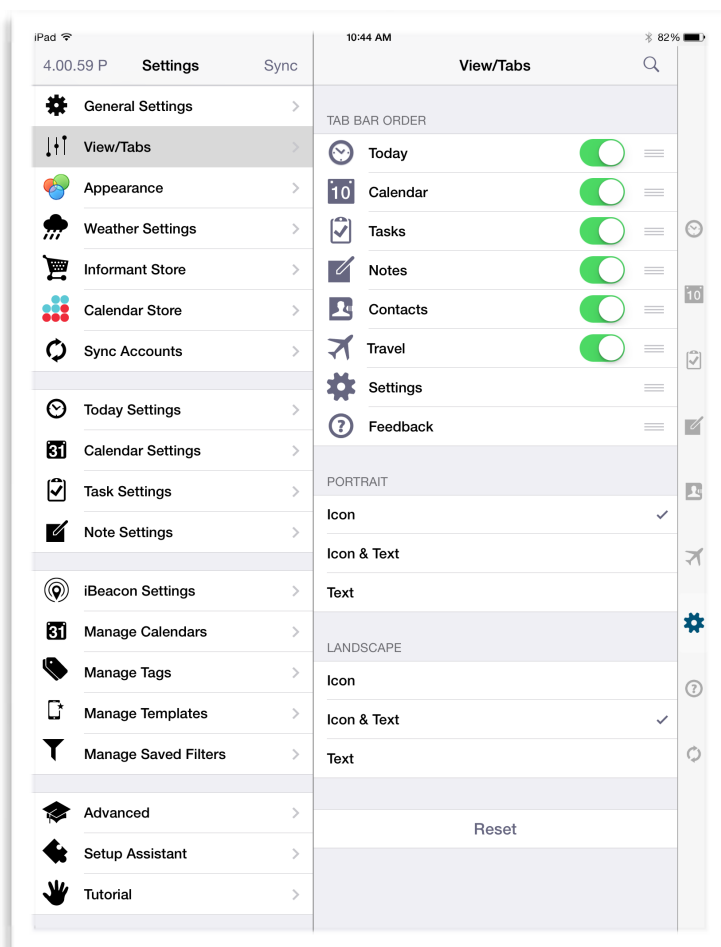
Appearance- In the appearance settings the look of Informant can be fully customized to your needs and preferences. The appearance settings are listed below with a brief explanation of each.

Theme- This setting allows the interface of Informant to use a color scheme of your choosing. There are many choices to compliment your device color, personal preference, in some cases the colors might even match your corporate colors!

Max Title Display- Here you can set how the task and event titles are displayed. If the title is long you can have Informant show a partial title or up to 3 lines of text for the title.

Customize Event/Task Display- This setting allows for fine tuning of Informant visual element detail, for example this is where you turn on the icons to indicate repeating items, etc. In this setting, the dark items are active, the light items are inactive. Tapping an element toggles it between active and inactive.
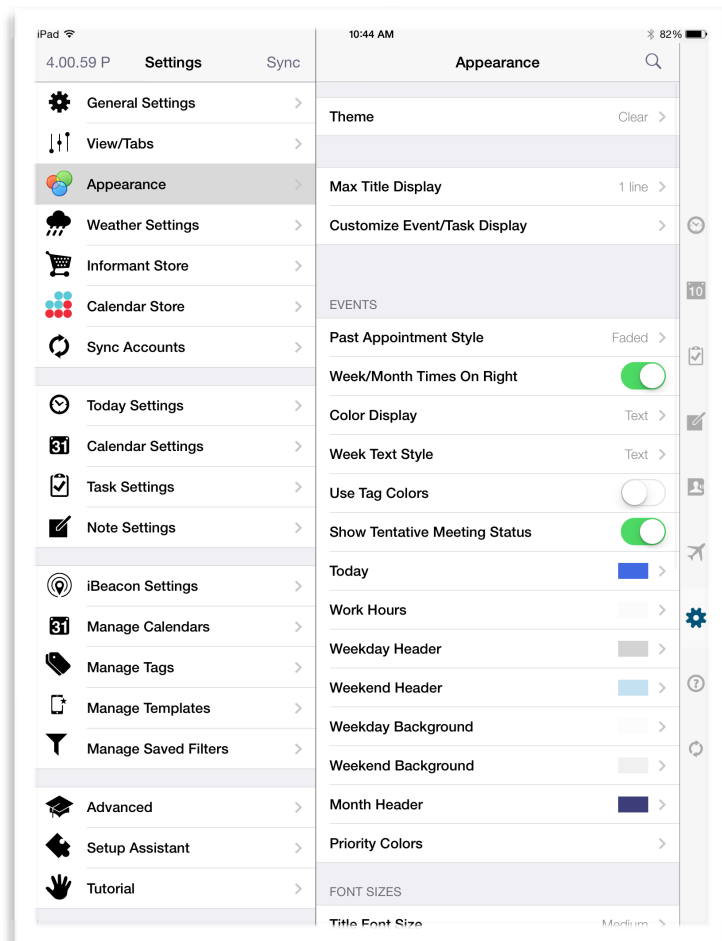
Events

Past Appointment Style- The setting here will let you determine how the past events look, you can choose from 3 different font options or a "none" setting that when chosen will let the past events look just like the current events.

Week/Month Times on Right- The default for the event times is to display on the left of the field in the week and Month View. Turning this setting on will move the time display to the right of the field. When set to on, the all day events will show the message "All Day" where the time would normally be displayed.

Color Display- This is a very important setting. This setting determines how the text will be shown in the Calendar Views. There are 3 settings, the none setting will use a default text color (usually black) for all events. The Text setting will show event text in the calendar color. The other option is the use Background Cell, when chosen this setting will use the calendar color as a background for the event cell in the Calendar Views, the text color is set automatically by Informant to contrast with the background

color for read ability. (in both color options if the use tag colors is set to on the calendar color will be overwritten with the tag color if the event has a tag assigned to it).

Week Text Style- In the Week View the text either has to use the calendar color for the text or the calendar color as a background. In this setting you determine which one that you would prefer to use.

Use Tag Colors- Turning this slider on will use the tag colors instead of the calendar colors for events that have tags assigned to them. The text or background settings applied to the events will still be abided by but the colors themselves will reflect the tag. If multiple tags are used in the event the first tag assigned will be the color that is used.

Show Tentative Meeting Status- In some sync configurations an element is synced that will provide a tentative color for an event. This is a very rare occurrence and doesn't apply to most Informant customers but for those who do use it, moving this slider to on will apply the tentative color to the event text or background depending on your display settings. Tag colors will override this color in the event of a tie.

Today-Other Month Background- These are color settings for the different calendar elements. Tap the item to open the color palette and change its color. Those colors will be applied to the appropriate Calendar Views.

Font Sizes

Title Font Size- There are 3 different choices for the title font size of an event, the choices are small, medium and large with medium being the default.

Day View Font Size- In the Day(s) View this setting will set the font size for events. The choices are small, medium and large with large being the default.

Day View: All Day- In the Day(s) View this setting will set the font size for all day events. The choices are small, medium and large with large being the default.
Month Cell Font Size- In the Month View you can set the font size for the individual month cells. Four choices are available, tiny, small, medium and large. Medium is the default.

Week View- The text in the Week View cells can have its size adjusted with this setting. The choices are small, medium and large with large being the default.

Tasks

Color Display- This setting determines how the text will be shown in the Task View and Calendar Views if set to display there. There are 3 settings, the none setting will use a default text color (usually black) for all tasks. The Text setting will show task

text in the unsynced or sync service color. The other option is the use Background Cell, when chosen this setting will use the task color as a background for the task in the views, the text color is set automatically by Informant to contrast with the background color for read ability. (in both color options if the use tag colors is set to on the task color will be overwritten with the tag color if the task has a tag assigned to it).

Use Tag Colors- Turning this slider on will use the tag colors instead of the task colors for tasks that have tags assigned to them. The text or background settings applied to the tasks will still be abided by but the colors themselves will reflect the tag. If multiple tags are used in the task the first tag assigned will be the color that is used.

Dim Future Tasks- For quick and easy identification it is possible to have the future tasks appear dim or faded in the views when this slider is set to on.

Overdue- Setting a color here will apply that color to the text or background (depending on your settings choices) when a task remains in progress beyond its due date. This makes it very easy to identify those tasks in the various views.

Priority Colors- In this portion of the appearance settings you can set two attributes for each of the task priority options. The background color and the text color for each priority can be set here.

Contacts

Carousel Mode- If you are using the pictures option in the Informant contacts view this setting determines how those pictures are displayed. The choices are Flat, Cylinder, Flow, and Flip. We suggest that you try each one to see which one you like the best.

Notes

Font Size- This setting determines the default font size for the notes application, there are six different settings ranging from the default 11 up to 24.

Reset Appearance- Tapping this button will return all appearance settings to their defaults.

Weather Settings- This section of the settings only applies if the weather add in has been purchased. If you ever have trouble seeing the weather in Informant check these settings first as often the weather being out of view is nothing more than a weather setting being incorrect. The weather will show in the Today View, and all Calendar Views except the Day(s) View. The weather is provided by a 3rd party and while their global coverage is very good there are some places where there is simply no weather data available, in those cases the weather feed will be from the closest geographic location that has a weather station accessed by our weather content provider.

       Weather Location- It is possible to enter a zip or postal code here to get weather for a specific location. When set to automatic the weather will show the data for the current location of the device. For the automatic setting to work you must have the location services enabled in the device privacy settings.

       Refresh Weather- Tapping here will pull the latest informant from the weather feed and display that in Informant.

       C/F- This setting determines how the weather temperatures are displayed, there are 3 options. Automatic will use the devices own temperature display settings. The other two choices are Fahrenheit or Celsius

       Today View-Week/Month Detail View-These sliders when set to on will display the weather in the various views.

At the bottom of the weather settings is a link that you can tap to view more detailed weather information provided by our weather content provider.
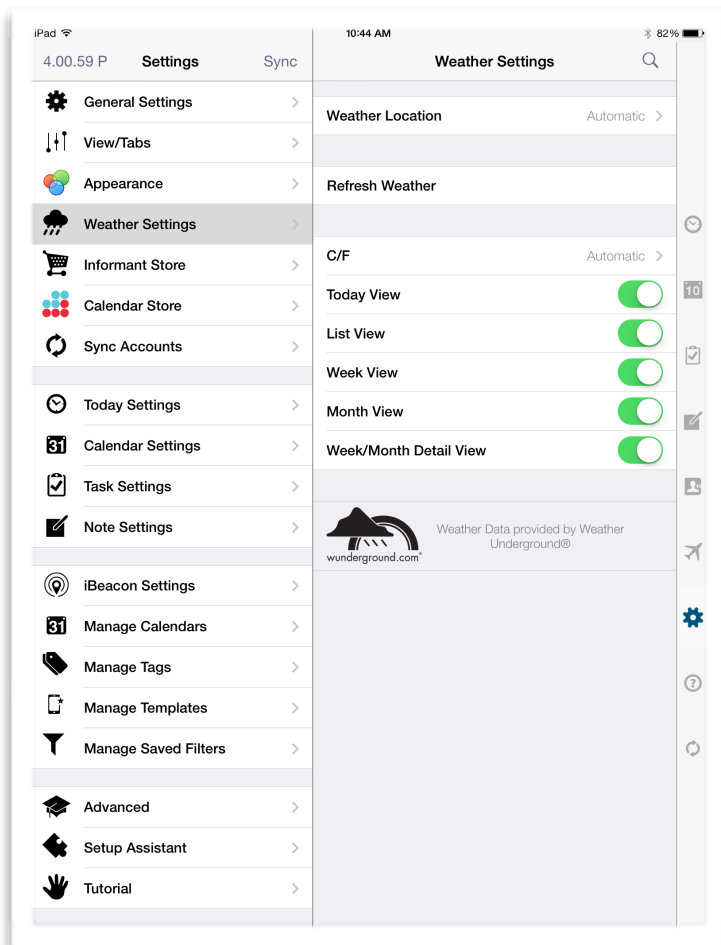
Informant Store- In the Informant Store you can add features to your Informant application to customize it even further for your needs and tastes. As time goes on more items will be added to the store.

NEW In the Informant store pre-populated calendars for holidays, sports events, etc. can be purchased. The calendars and their data are provided by SchedJoules.

Full Premium Upgrade- If you have the free version of Informant you can tap here upgrade your free version to the Premium version and unlock several more features and capabilities. Please see the "Versions Section" earlier in this document for further information.

Weather- Tap here to purchase the weather add in. This add in will provide weather information in 3 of the Calendar Views and the Today View.

Informant Sync- If you have never used Informant Sync you can set up your account here. If you are an Informant Sync customer and need to renew your subscription that can be done here as well. (Your subscription has to expire before you can renew in app, as soon as you renew syncing will be immediately restored)

Restore Purchases- If you have a new device or for some reason uninstalled and reinstalled Informant tapping here will restore the upgrades and add ins that you have purchased for Informant.
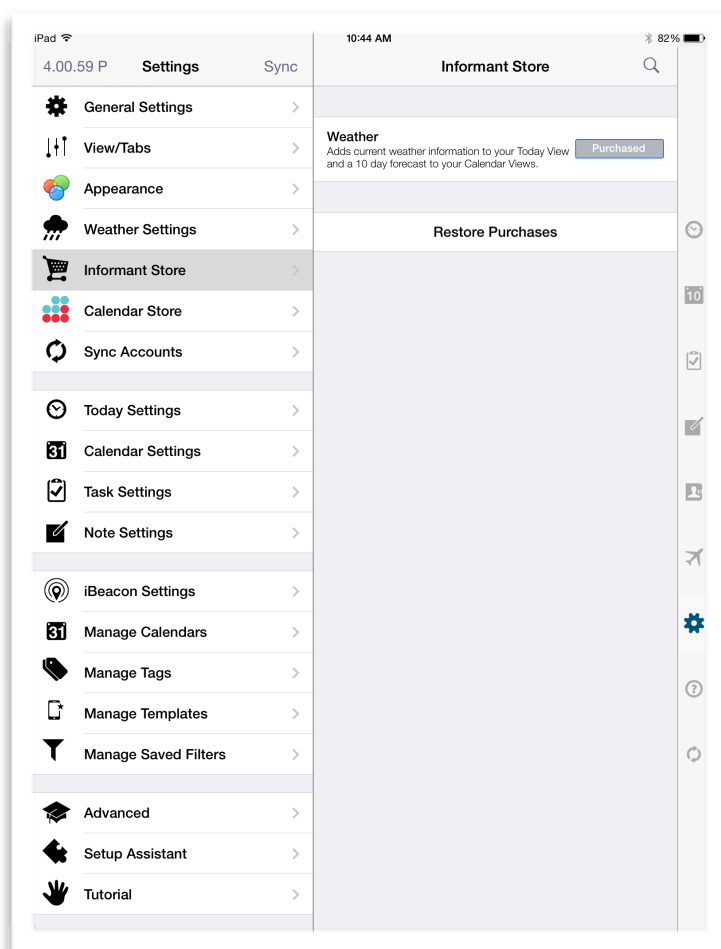
Calendar Store- In the calendar Store you can purchase and add specialty calendars to Informant.   The initial offerings include sports calendars, religious calendars, holidays and more. In the event that your purchased calendars are not visible simply tap the restore purchases button in this view to bring them back. Below the restore purchases button you will see the county button. Tapping this will allow you to select the country for your calendar and will apply the relevant calendar feeds for you to choose from.

Sync Alerts- Should you have a difficulty syncing or if it appears that your data may not be syncing correctly you can check this setting to see of you have any sync alert messages and what they may be. These are helpful when contacting support to request assistance with your concern.
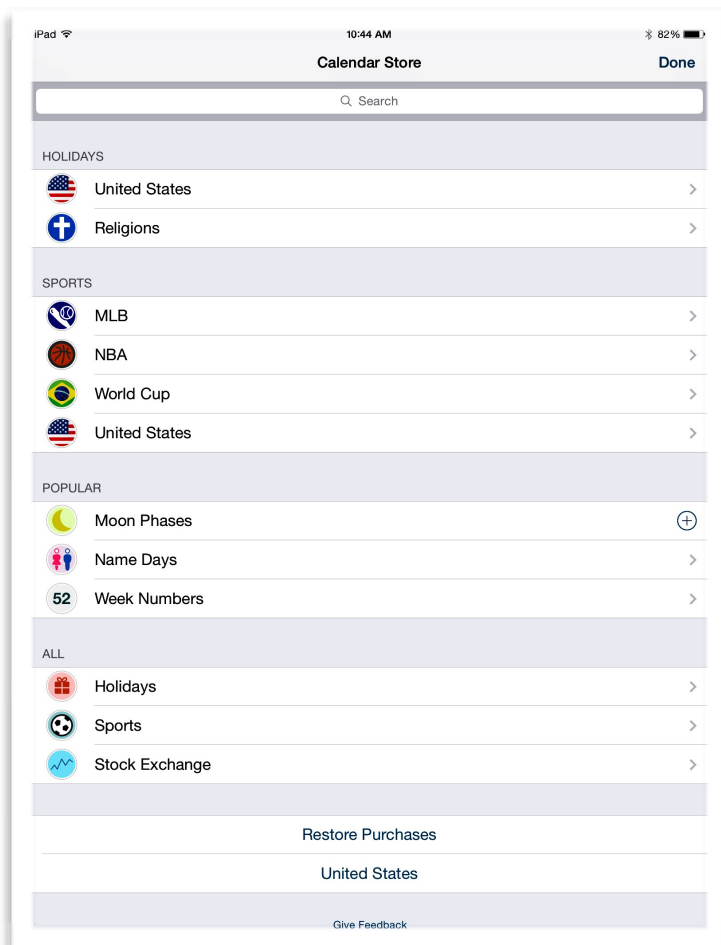
Sync Accounts- The settings in this section are very important as they determine what sources Informant uses to receive and send data. Please see the section on syncing and sync services at the beginning of this document.

      Calendar App- When this slider is set to the on position the data from the iOS Calendar application will be available for use in the Informant application. This setting has to be on if your device is syncing to Exchange and
you want to access that data inside of Informant.

      Reminders App- When this slider is on the data from the iOS Reminders database is available for use in Informant.

      Options- These settings are used when the iOS Calendar App and iOS Reminders app sliders are set to the on position. Here you can set what specific device calendars and reminders lists are available to Informant, what the color for the reminders will be and you can change to the iOS Reminders and Events editors and use those in the Informant application.

Sync Services

      Add Sync Service- If you wish to use one of the supported sync services, this is where you will start. Tap the add button, then select the sync service you wish to use and follow the prompts. The choices are Informant Sync, Google Calendar, Google Tasks, Toodledo, Evernote, and iCloud Reminders.

      AutoSync- This is where you set the auto sync interval for the application. If Informant is in the background when the autosync time comes about the app will sync when it is opened the next time, this way the very latest data is always in the application. If Informant is enabled in the new "Background App Refresh" setting of iOS 7, then autosync will occur, even when Informant is in the background.
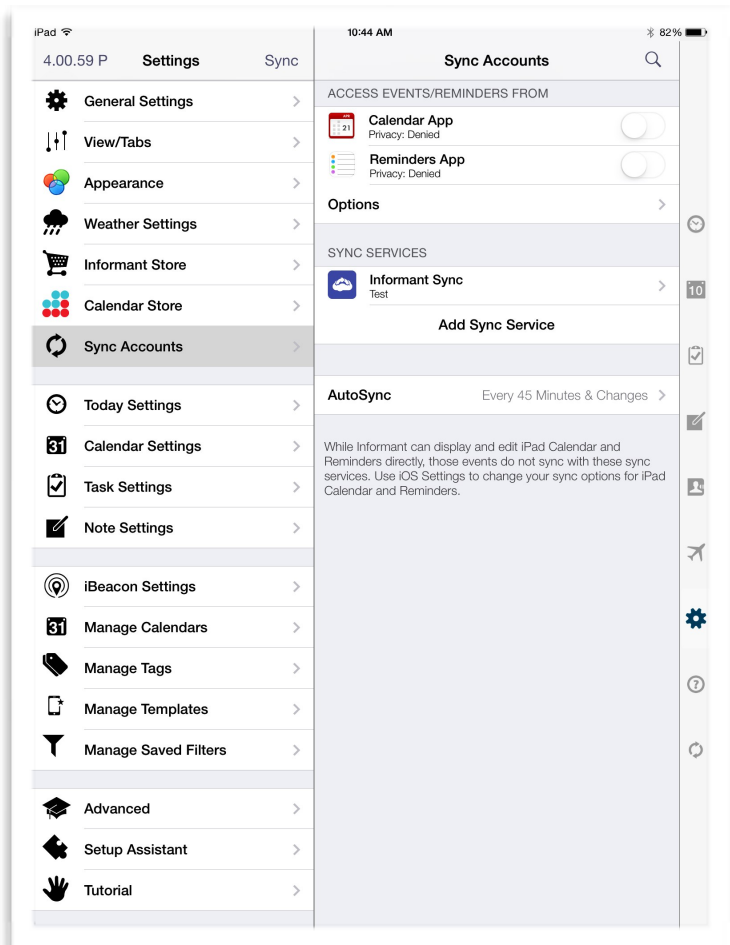
Today Settings- The settings here determine what data is visible in the Today View and how it is arranged.

Show Weather- This setting when turned on will allow the weather to be shown in the Today View.

NEW-If the event has location information and you are using the weather option the weather for the location of that event will be displayed.

Show ETA- When enabled, for tasks and events that have a location assigned to them Informant can estimate your arrival time.

Show Events-**Alarms** These settings allow you to choose what information is displayed in the Today View, turn the items on and they will be visible in the Today View. You can also drag and drop the order if the items here.
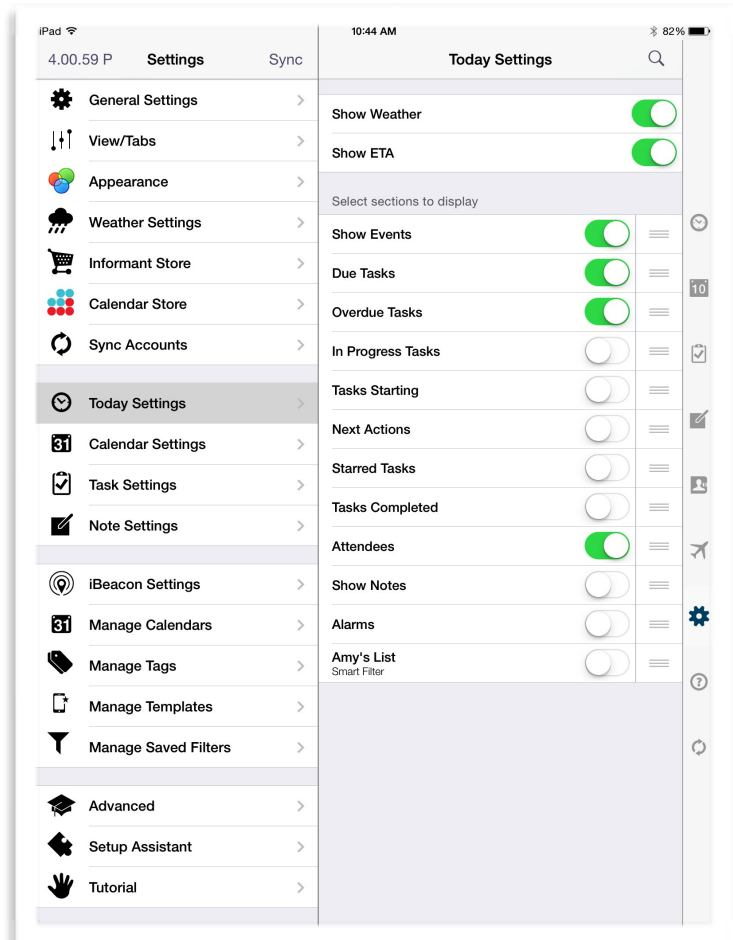
Calendar Settings-

Event Conflict Checker-
When enabled this tool will show
you where your schedule
conflicts are.

NEW Conflict checking can now
be applied individually to the
calendars in this setting.

ISO Week Numbers-
Using this setting will show the
ISO week numbers in the Month
and Week Views in Informant.

Work Hours- These
settings allow you to specify your
work hours for each day of the
week. When set your work hours
will have a different background
color in the Day(s) View and on
the time line in the Week View.

**Alarm Notification
Sound-** In this setting you can
choose an alarm sound for the
event alarms. This sound only
applies to events assigned to the
Informant Calendars, if your data
is assigned to an iOS Calendar
then the devices alarm sound will be used.

Repeat Every Minute- When set to on this feature will repeat the alarm every
minute until it is acknowledged.

Defaults

Default Calendar Alarm- When enabled all new events will have a default alarm
applied to them.

New Event Duration- This setting will apply the same duration to all new events
that you create, the durations range from 5 minutes to all day.
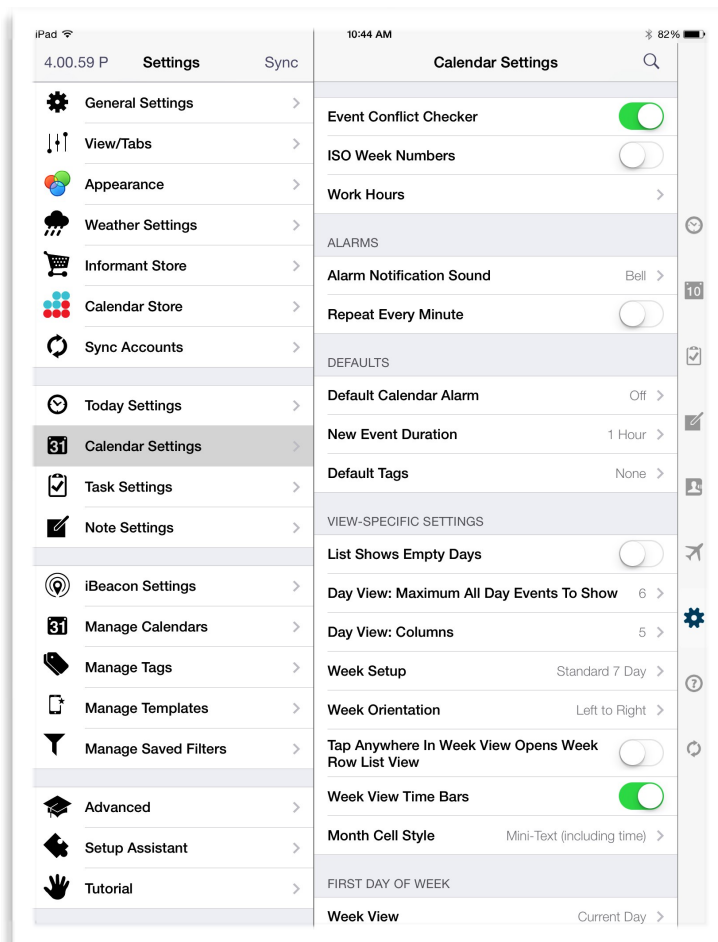
Default Tags- If you would like for your event to have a default tag you can set that tag choice here and all new events will be created with this tag.

View Specific Settings

List Shows Empty Days- The List View does not show the empty days by default, turning this on will allow you to see those empty days.

Day View: Max All Day Events To Show- In the Day(s) View the all day events are shown at the top of the day column, this setting allows you to control how many are visible. If you have more all day events that you set for visibility for example if you have 6 all day events but and the Max All Day events set to 3 you can scroll the remainder of the events.

Day View: Columns- The Day(s) View can show as few as one day or as many as ten in a grid style view with each column representing a day.

Week Setup- The Week View has several options that allow you to get the Week View that best fits your needs. The choices are Standard 7 day which shows the 7 days in a normal configuration with the current day at the top. 7 Day Split which will show the week with the weekend displayed in the cell for one day. Weekdays which will show only the 5 weekdays in the view. Columns, this setting will make the Week View look very similar to the Day(s) View but it will not allow the number of days shown to be changed. Column Weekdays, this will show just the 5 weekdays in a Day(s) style grid view.

Week Orientation- You can set Informant to view your weeks from left to right or top down. The top down option will rearrange the days so that the next day is below the current day and the day after that is shown below.

Columns For Landscape Week View- When rotated to the landscape Week View this setting determines how many columns will be displayed.

Tap Anywhere In Week View Opens Week Row List View- When enabled this setting allows the Week View to switch to a List View.

Week View Time Bars- This setting provides a time bar grid at the top of the day in the Week View, the time occupied by events is visible in the time bars.

Month Cell Style- In the Month View the individual cells can be customized. The first option is the time bar, this is a bar showing the calendar color and it spans the cell. The next option is icon, if your events have icons assigned to them, this setting will show just the icon of the event. Mini-Text will show the title of the event, Mini-Text including time, will show the event title as well as the event times. Finally there is Mini Text with colored background, this will show the title of the event but will use the

calendar color as the background and the text color will be auto selected by the application.

First Day of Week

     Week View- You can set any day of the week to be the top day in the Week View. The default is use the current day which will always keep the current day on top.

     Month View- In the Month View you can set the first day of the week to any day of the week, the Month View grid will adjust accordingly and the weeks of the month will start with the day selected.

Tasks In Calendar View

     List-**Month** To view the tasks in any of the Calendar Views you will just simply need to turn on that view corresponding slider.

Types of Tasks To Show

     Method- Essentially this is another way to determine what tasks are shown in the Calendar Views. The two choices are in progress or due and overdue. If set to due and overdue the any tasks that are due that calendar day or that are past due will be visible. If in progress is selected any task that has not been completed will be shown in the day

     Show Overdue Today- With this setting enabled the overdue tasks will be visible in the current day.

     Show Completed- When a task is completed it is removed from view, with this setting on the tasks remain visible in the calendar even though they are completed.

Task Settings-In this portion of the settings you can set the attributes for the tasks to your liking and needs. If you are using iOS Reminders inside of Informant not all of the task features will be applicable.

> **Task Mode**- Informant supports three different task modes. Franklin Covey which will provide the Franklin Covey task priority elements. Standard which is based off of the Getting Things Done (GTD) philosophy and Simple Tasks. The simple task mode is best used with the Google Task sync as it provides very basic task support, in this mode many of the task features in Informant are disabled.

> **Editor Features**- In this area you can customize the fields that are visible in the task editor. Moving a slider to off will remove that field from the editor. You can also drag the editor elements into a different order by doing a tap and hold at the far right of the element and dragging it to the desired location.

> **Alarm Notification Sound**- This setting allows you to choose a distinct sound for your tasks that have alarms. The sounds however do not apply when the task is based in the iOS Reminders.

> **Repeat Every Minute**- When set to on this feature will repeat the alarm every minute until it is acknowledged.

> **Task Tab Badge**- In the Informant application it is possible to have a badge show over the task tab. In this setting you can disable the task tab badge with the none setting. You can also set the badge to show the following task information, Overdue Count or Due Today Count, or you can set the badge to show the count for both.

> **Manage Smart Filters**- In this setting you can manage any Smart Filters that you may have created in the Task View. You can add, edit and delete the Smart Filters here, just select the one you wish to edit or delete and the options will be available to you.

Defaults
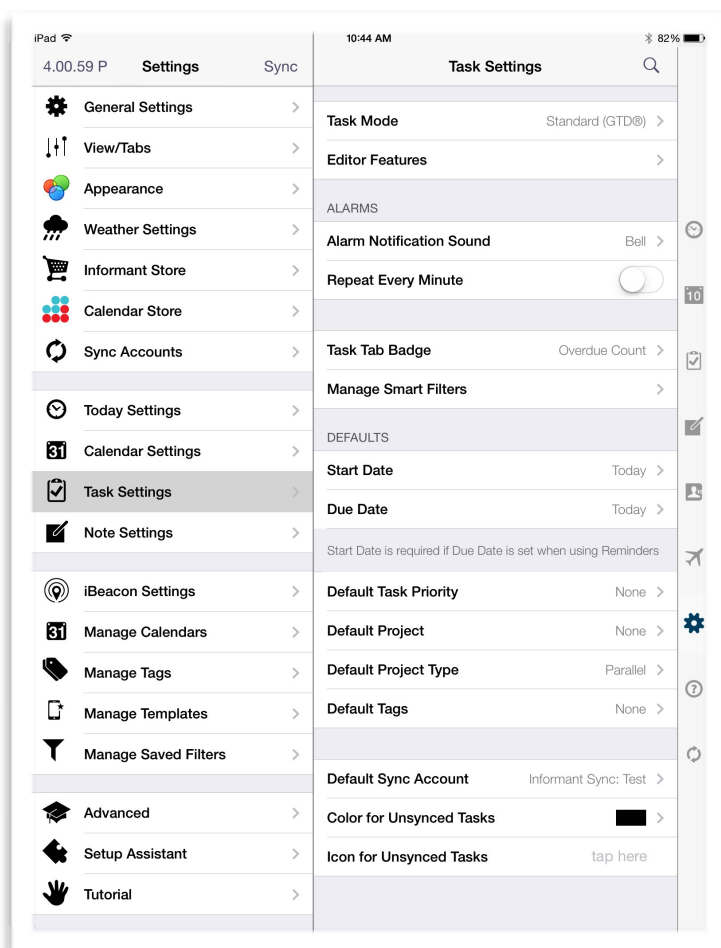
Start Date- Using this setting you can create a default start date for all tasks that are created in Informant. This default start date is based on when the task is created and can range from Today through the end of the month. There is also a "none'" setting where the start date will be blank on all new tasks.

Due Date- Using this setting you can create a default Due date for all tasks that are created in Informant. This default Due date is based on when the task is created and can range from Today through the end of the month. There is also a "none'" setting where the Due date will be blank on all new tasks.

Default Task Priority- Choosing a setting here will apply the same priority to all new tasks created in Informant. The choices are Low, Medium, High, Top and a None setting which will not automatically assign a priority to the new tasks.

Default Project- You can choose a project from your project inventory in Informant and have that project be assigned to all new created tasks.

Default Project Type- When adding a new project you can set a default for that projects next action handling so that all new projects will have the same attributes. The choices are Parallel which means that in the project will manage the tasks in a parallel manor. Sequential takes the next actions on the project in their literal order and advances them accordingly. Single Action, in this setting there can only be one next action in the project until it is completed then it can be followed by another.

Default Tags- From you tags inventory you can designate a default tag that will be visible on all new tasks created in Informant.

Default Sync Account- This setting will assign a compatible sync account of your choice to be the default for all tasks created in Informant.

Color for Unsynced Tasks- For easy identification Informant makes unsynced tasks a specific color, here you can choose what that color is.

Icon for Unsynced Tasks- If you wish to use an icon to to indicate that a task is not synced you can choose an icon in this setting that will indicate the task has not yet been synced.

Note Settings- The built in notes application for Informant is a powerful tool that allows for the creating of text and voice notes. In this part of the settings you can setup the notes behaviors to your tastes and needs.

   Notes Tab Badge- With this setting you can configure the notes tab to display a count, you can choose any of the following settings. Notes Today which is a count of the text notes with the current date on them. Voice Notes which is a count of the voice notes being stored or a setting to display both counts. There is also a "none" setting that will show no badge over the notes tab.

   Enable Bluetooth Audio- If you use a Bluetooth device with your device, turning this setting on will allow Informant to make recordings through your Bluetooth device.

   Default Sync Account- If you have a sync service set up in Informant that is compatible with syncing notes you can select that here to be the default sync account for all new text notes. (If Informant Online is selected as the notes sync service the voice notes will be synced as well.)

   Color for Unsynced Notes- To easily identify notes that have not been synced Informant assigns a color to them, in this setting you can determine what that color will be.

   Icon for Unsynced Notes- If your preference is to use an icon to identify the unsynced tasks you can choose an icon and assign it here.
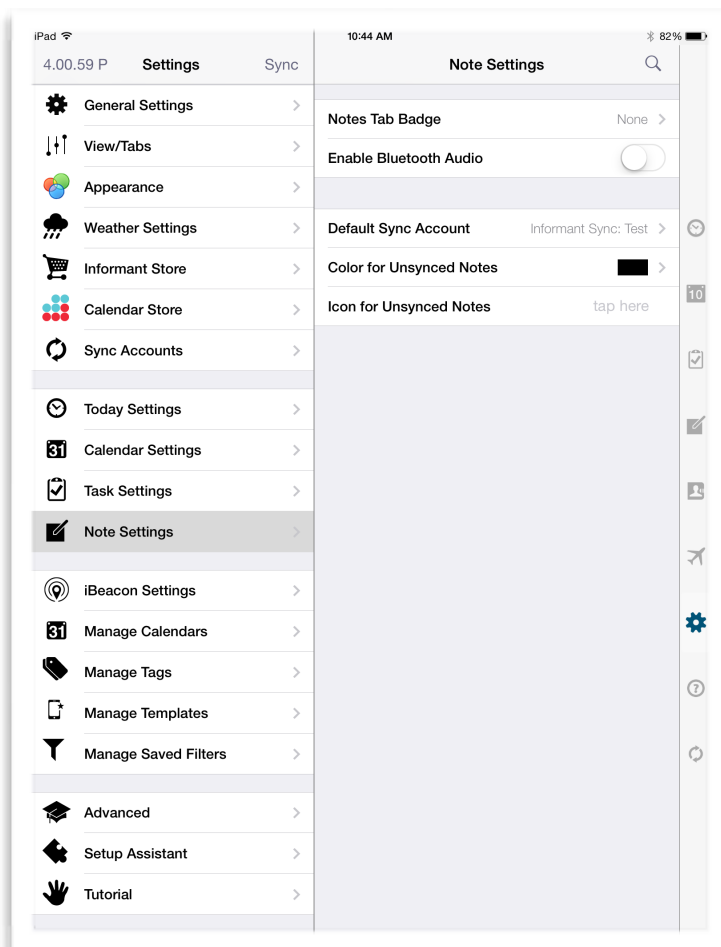
iBeacon Settings- iBeacons are new technology that is supported by Informant. They allow you to set more precise location alarms than the standard GPS based locations. Informant can notify you of tasks when your are near specific people (also using Informant) or near Informants own iBeacon devices. The range for an iBeacon is about 30 feet.

In these setting there are links to explain the iBeacon technology in more detail and provide purchasing information for the Informant iBeacon standalone devices.

Broadcast Personal Beacon- When enabled this setting will use your device itself, via Informant to become an iBeacon.

Name Nearby Beacons- If you have a commonly used iBeacon you can assign it a specific name in Informant. This name does not change the iBeacon itself but rather when Informant see's that specific iBeacon it will use the name that you have assigned as a label when it alerts you to the iBeacon.
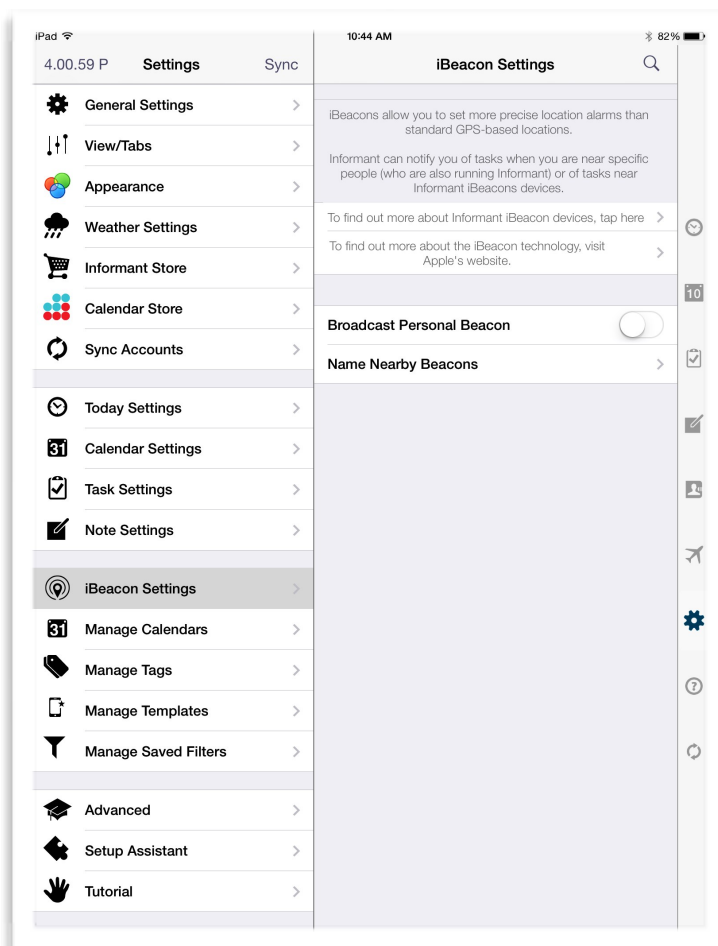
NEW Not only can Informant serve as an iBeacon but we have an OSx application that will make your Mac an iBeacon, you can also use iBeacons with Informant to set tasks that will allow you to have indoor location alerts.

Manage Calendars-This is where the individual calendars added, edited, or deleted. You can set calendar colors, defaults, time zones, sync services, and view the statistics for that calendar. Viewing this setting will show the available calendars and their sync services in a list. Just tap a calendar to see its properties and edit them or delete the entire calendar.

FYI iOS/Exchange calendars cannot have their colors changed

FYI Deleting a calendar will delete the events assigned to that calendar along with the calendar itself.

FYI Deleting a calendar that is synced with Informant Sync will delete the Calendar in Informant, as well as on the server. Deleting a Calendar that is synced with Google will delete the Calendar in Informant, mark it as no longer syncing, but leave it intact on the Google server.
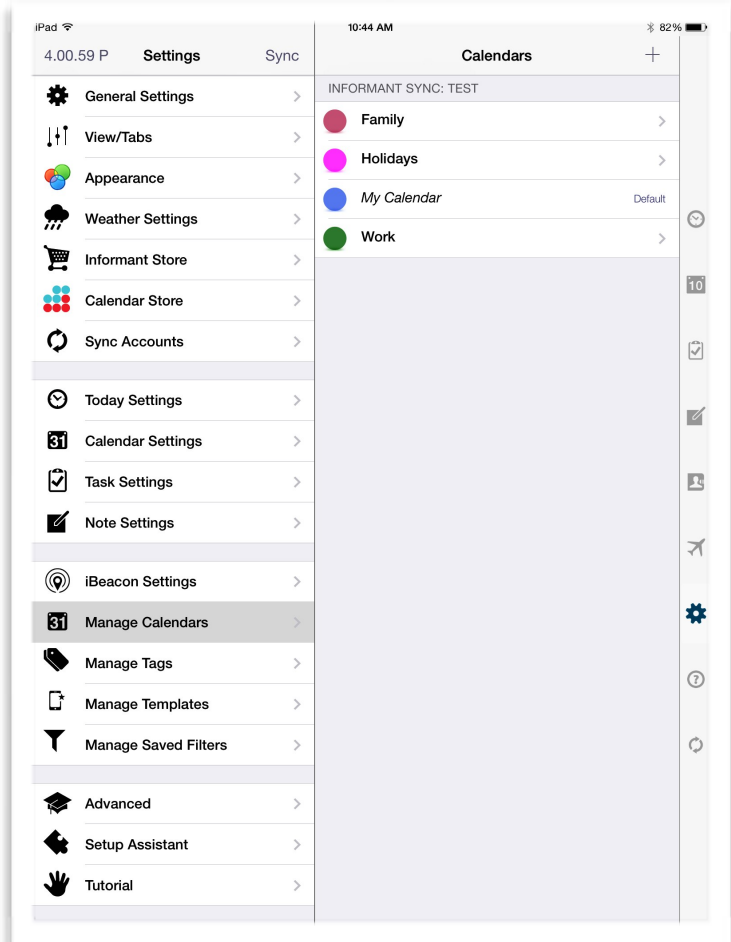
Manage Tags-Here you have the ability to view, edit, add and delete your inventory of tags. Tap the plus button at the top right to add a tag, tap an existing tag from the list to edit or delete it.

Manage Templates-This portion of the Informant settings is where the Template maintenance is done. Templates can be created, viewed, edited and deleted here.

The setting has two areas, Event Templates and Task Templates. If you have existing templates they will be displayed under the appropriate heading, just tap one to edit it.

To add new templates from scratch tap the green plus sign that corresponds to the type of template that you wish to create either an event template or a task template.

Manage Saved Filters-In the Calendar Views or Task View if you have created filters you can fully mange those filters here.

To delete a filter tap the red badge at the left of filter name.

To edit a filters properties tap the filter and make the edits then tap save.
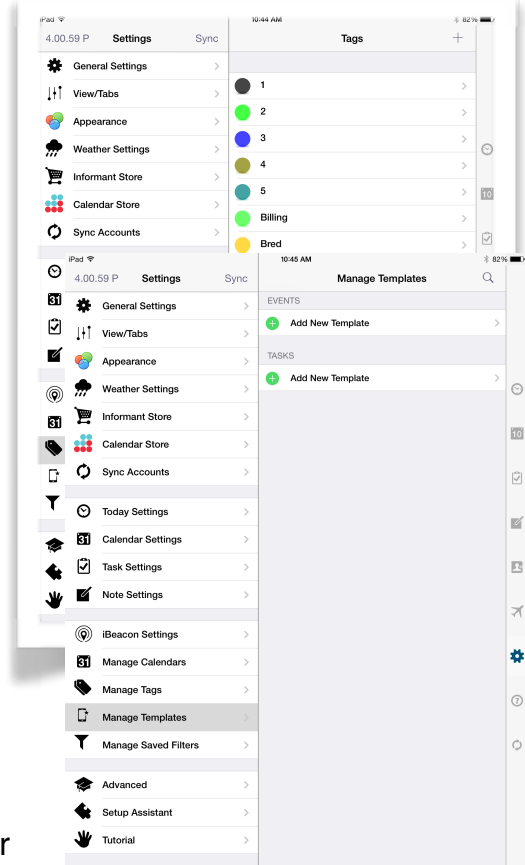
Advanced-The advanced settings in Informant include several tools for support, a self healing too, and some very specific settings to the application. These are explained below.

      Backup/Restore- In this area you can make a backup of your Informant database, you can also go here to restore a database. If you restore a database any data currently in the application will be overwritten by the data from the restored file. The Automatic Backup duration setting. This setting determines how often Informant will back up its data. Seven backup files will be kept with the oldest being replaced by the newest.

      Dropbox backup/Restore- This system works similar to the built in backup/restore option in Informant but instead of storing the backup files in the application they are stored in Dropbox. If you wish to copy your database to another device with Informant or you simply want a backup that is not stored in the app or device this option would take care of that for you. Just like the built in backup, the process of backing up to Dropbox is a manual operation that has to be initiated by the customer. Also just like the built in backup, restoring a file will overwrite any existing data in Informant.

      Database Management- Mostly used for diagnostics or to correct specific behaviors the database settings are global in nature and if used incorrectly you can delete all of the data in the Informant application. The settings here are self explanatory for the most part. Erase Informant data will do that, the settings and data will be purged. Reset Alarms, if you have stray alarms that don't match up to anything tapping this button refreshes the alarms and should correct issues of that nature. Reset Cache, if you are having difficulties with recurring tasks or events tapping this button can sometimes correct those. WDS Upgrade, this setting is for use only with the WDS sync method. The WDS sync method is no longer supported and in normal use you should never need this button. This is primarily for our legacy customers who are still using this sync method.

      Database Statistics- Tapping into this view will show a count of all the elements in Informant. This setting is particularly helpful in making sure that two devices syncing
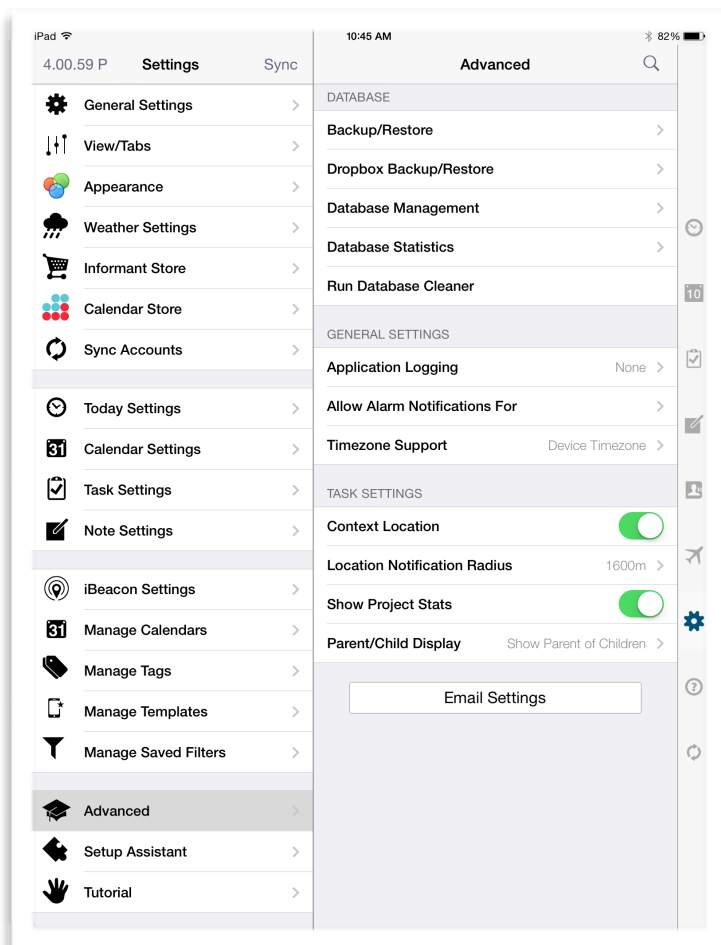
Informant to the same place are showing similar amounts of data in their database. It is unlikely the numbers between two devices will match exactly but under normal conditions they should be close.

Run Database Cleaner- If you are getting a sync error of the application becomes unstable tapping the Run Database cleaner will go through and make corrections to the database structure and essentially defragment the database. In many cases this resolves sync issues and stabilizes the application.

Application Logging- This is a diagnostic tool. if you contact support and they need information about what is happing in Informant they may ask you to set the logging to a specific setting, they are Sync Only for sync logging data, Alarms to identify the source of alarms that are misbehaving and why. General Debugging, this option is not often used as it generates a lot of logging data and can slow down the app performance. Repeat, this logging is for recurring events and tasks, if there is a specific recurrence issue support may ask for your repeat logs. The final logging option is All Logging, similar to General Debugging this setting generates a lot of data and can slow down the device, it is something that is not used very often but it is a helpful tool in specific situations.

Allow Alarm Notifications For- Set these sliders to on to allow alarms for the Tasks and Events.

Time Zone Support- The optimum setting here is to have Informant use the device time zone, however if you want to reset the default time zone being used by the application it can be adjusted here. It is not recommend to change this setting when travailing as the results will be incorrect. Informant will compensate for any setting that you have here. If the device setting is chosen Informant will adjust the items shown accordingly, if you have changed this setting then travel then Informant will determine how far off from the device time zone it has been set to and will apply that to the data when traveling.

Context Location- If you are using contexts with locations in the Task View you will need to turn this setting on so that the contexts can use the location data.

Location Notification Radius- In this setting you can set the relative distance from the location for the context alarms to fire.

Show Project Stats- This toggle turns the project dashboard on or off. If you wish to use the project dashboard set this to on.

Parent/Child Display- Informant currently provides a single level of subtasks. Whenever Informant shows a task with subtasks, you'll see the parent task displayed as normal (except that the "completion" button is replaced by a disclosure triangle). All of the subtasks are indented under the parent task. You can collapse/expand the subtasks by tapping on the triangle.

FYI If you tap-and-hold on the triangle, Informant will ask if you souls like to complete the parent AND all the child tasks immediately. This is a convenient way to quickly complete all the subtasks under a given parent.

Since Informant has many filters and ways to focus on specific tasks, there are many different ideas about how it "should" behave when you are looking a specific filter where some (but not all) of the subtasks match. For instance, suppose you are looking at tasks due "today" and you have a task with three subtasks, but only one of those is due today. How should the parent/child hierarchy be shown or should it be shown at all? To accommodate this, Informant has 3 different options you can choose from:

- **None** - No attempt is made to preserve the parent/child hierarchy at all. Only tasks that match the given filter are shown. If both the parent AND the child tasks match the given filter, you will see them presented like normal (with subtasks indented), however, if the parent doesn't match the filter but a subtask does match it, the subtask will appear to be a regular task (not indented at all) since the parent isn't present.
- **Show Parent of Children (default)** - This mode will cause Informant to always preserve the parent of a child no matter what. Meaning if a child task matches the current filter but the parent doesn't, Informant will still show the parent task so that you can see that the matching task is, in fact, a subtask. In the situations where the parent doesn't match the current filter, the title of the parent will be italicized so you can quickly see that it only shows up in your filter in order to preserve the parent/child hierarchy. There are a couple interesting things to note about this mode:
    - If the parent **doesn't** match the filter, **only** matching subtasks will appear under it. For instance, in our previous example where you are looking at the "Due Today" filter and the parent isn't due today, but one of the three subtasks is due today, using this mode PI will show the parent (italicized) and the one matching subtask. The other two subtasks remain hidden.
    - If the parent **does** match the current filter, then **all** subtasks will be shown.   So, again in our example, if the parent task was Due Today, then **all** the subtasks of that parent would appear in the filter regardless of their due date - they show up because the parent matches.
- **Show Parent and all Children** - This causes PI to always show the complete parent/child hierarchy in a given filter as long as either the parent or any one of the subtasks match the current filter. So, if you are looking at the Due Today filter and the parent task is **not** due today, but one of the three subtasks is due today, PI would show the parent and all three subtasks.

Email Settings- Tapping this button will open an email with your settings files as an attachment. You can use this file in other like versions of Informant to make the settings the same. When the file is received just tap on it from the email client and the file will be transferred to Informant.

Set Up Assistant-Tapping this will start the setup program and will walk you through the basic Informant setup as well as let you manage some of the initial settings.

Tutorial-A tap here will provide a video that will provide instructions for some of the most common Informant settings and features. You can stop and exit the video at anytime by using the buttons at the very bottom of the screen.

Feedback-This tab has many functions. Each of the functions will be explained below. This is the tab where you can access the knowledge base, set up a new case to support and several other functions.

      Help/Tips-Tapping this will open a web page with access to the Informant Knowledge base.

      Open Support Ticket-This is where you can create a support case for your Informant concern. It is preferred that if you have a concern with Informant that you open your case to support from here because in doing so we will be able to see how you have Informant configured as that information will come as part of the case notes and will save us, in most cases, from having to as further questions about your configuration.

      Request Feature-This item is the option that you will want to use if you have a suggestion for a new Informant feature. Entering your request here will allow other Informant customers to comment and vote on the suggestions. It also provides the information necessary should someone from engineering wish to contact you. Many of the current Informant features were born here.

      Newsletter Subscription-In this tab you can sign up to receive the Informant newsletter. This is a short read that provides tips, tricks, wisdom and information about the Informant family of applications.

      Tell A Friend-Informants best and most effective means of marketing is you our customers. We believe that Informant is the finest application available for personal information management however hearing about it from friends and business associates is far more compelling than hearing us sing the virtues of the product. Use this tab to share Informant with others so that they can find out for themselves how great this application truly is.

      Rate In The App Store-We encourage all of our customers to post feedback about our product, of course we prefer positive feedback but we want our customers to be honest and detailed in their feedback. If you are unhappy and you choose to post less than positive feedback all we ask is that you be fair and present all of the details.
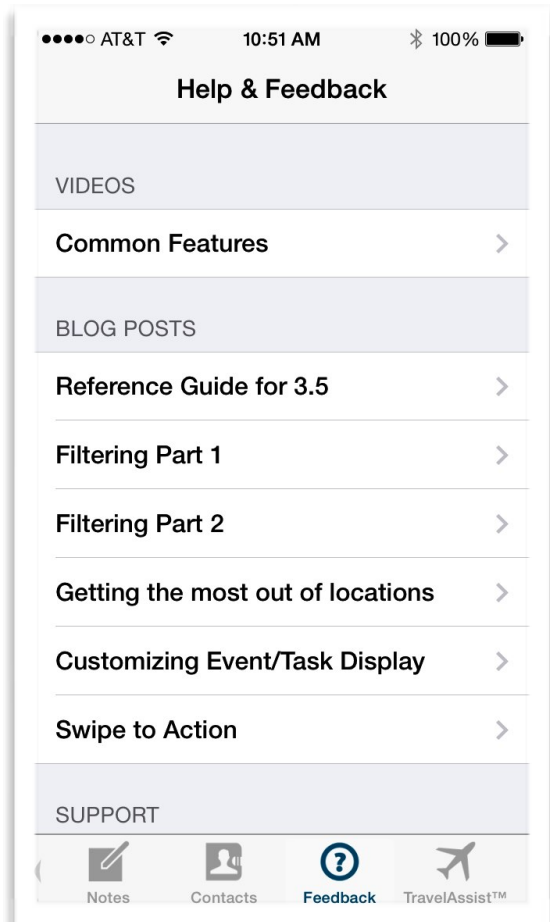
Feedback is very important to us and we take what you have to say very seriously and your words to impact your fellow customers.

General Overview of How To Use Informant

To begin with there is not really a one size fits all or preferred configuration for the Informant application. At its heart is the strength and flexibility to manage your information to exact preferences and needs. Informant literally has millions of different configurations and probably just as many uses. There is no document or writing staff large enough to contain everything that Informant can do. The following section is based on our customer support cases and what is most often reported to or asked of us. This section of the user guide is not going to touch a lot on syncing questions and concerns as they were addressed earlier.. In the following pages we will try to show you the places where the rubber meets the road so to speak with Informant and your daily usage.

Events-These are scheduled items in your calendar, they cannot be checked off when done and they will not show overdue if their date and time have come and passed. There is no method to measure the completeness of an event.

Meetings/Attendees/Invites-Informant will allow you to create an event, assign attendees and send the event as a meeting invitation to others via email. To do this your event cannot be assigned to an iOS Calendar.

In the event editor tap the attendees field, next tap to select the attendees you wish to invite from your contacts list. (all selected attendees must have a valid email address or they cannot be selected as an attendee). Once all desired attendees are selected tap the cancel button to back up to the editor and all of your contacts should be visible as being selected. Saving the event will ask you if you want to invite the selected attendees, selecting yes will request their attendance at the meeting via a clickable email request. Clicking on the invite attachment will present the recipients with an option to assign the event inside of Informant. In the Informant settings, the name that you have set as the meeting organizer will be shown as well on the meeting and to the recipient.

Recurring Events-Recurring events are event that happen over and over again. Recurrences can have patterns ranging from each day to multiple years apart and nearly everything in between. Do you have a meeting on the second Thursday of every month, or standing dates to workout three days each week? Chances are that Informant can accommodate your needs. When you are creating your event, in the event editor you can tap the repeat button. Which will open and show all of the "stock" repeat patterns. If none of those quite fit what you are looking for tap the custom option and essentially create your own recurrence pattern.

FYI If your event is assigned to an iOS calendar, not all of the recurrence patterns will be supported the list will be reduced accordingly.

FYI If you make an edit to a specific occurrence in the series that edit will break the occurrence chain, you will have all of the occurrences before the change, then a new series of recurrences will continue after the recurrence that has been edited. They may look just like the original series and have all of the same attributes but they will no longer be the same series. This will happen each time you edit a single occurrence of a series. This really only comes into play if you make a change to an earlier occurrence and apply the changes to all. The changes will only be applied until the first break in the recurrence pattern.

Event Colors-The events in Informant draw their colors from two sources. The calendar color is the main color for an event. To change the color of event you will need to edit the color of the calendar that the event is assigned to.

See the manage calendars section for instructions on how to do this. If your event is assigned to an iOS Calendar you will not be able to change the color of that calendar. The Informant application will let you edit the color of a device calendar and even save it but the color will not be held and will revert back to the original color. This is not a Informant bug but rather an iOS bug that prevents the color property from being written to the calendar when the changes are saved.

The other color source for events is from the tags. In the Informant settings you can set the calendar to display events using the tags color. When in this configuration the tag color overrides the calendar color in the display of the events. It is possible to assign multiple tags to an event, the event will show in the color of the first tag that was applied.

FYI Tags cannot be used when the event is assigned to an iOS Calendar, only calendars that are in the Informant database can have their colors changed.

Event Syncing-Is explained in the sync section but as a quick review in this area since we are talking in detail about events we'll cover the basics again.

The calendar assignment of the event determines where that event will sync. When you tap the calendar field in the event editor a drop down listing of calendars will be visible and you can not only see the calendars but what their sync source is as well.

When you assign an event to an iOS/Exchange calendar the event editor will change and will remove all of the fields that are not supported in the device calendar database..

Events assigned to the iOS/Exchange calendars do not reside in Informant instead they reside in the devices own calendar database and are simply shared with Informant, this means that Informant does not sync with the device calendars, it is essentially an interface for the data that database.

It is possible to sync in events as read only items. When this occurs the events cannot be edited, copied or used to create a template. Trying to do so will create an unstable situation for for Informant and the application will need to be restarted.

Event Location- Please see the section titled Location, Location, Location, earlier in this guide for details on how this feature works and how to use it.

Event Alarms-When an event is assigned to a Informant it is possible to assign multiple alarms to an event. To set an alarm you will need to tap the alarm field in the event editor and set the alarm as far in advance of the due time as you like.

Event Attendees-If an event is assigned to a Informant based calendar it is possible to send the event to attendees as a meeting invitation. If you tap the attendees field the contacts list will open up. Select the contacts that you wish to make attendees, only contacts with email addresses can be selected to be attendees.

Once all of the attendees have been selected tap the cancel button (as a back button) to get back into the event editor.

When the event is saved the option to email the event will be presented. The recipients will get an email with a .ics file attachment. If the recipients have Informant they can add the event to Informant from the email by doing a tap/hold on the event link and selecting Informant, if they don't have Informant the ics file can be added to most common calendar applications.

Event Attachments-Events assigned to a Informant calendar can have two types of attachments. At the bottom of the event editor are three buttons. Tapping the camera button will open the camera app and the photo taken will be attached to the event. The next button is the photo button. Tapping that button will open the device camera roll and you can select photos to attach to the event. The next button at the bottom of the editor is the contacts button. Tapping this button will open the contacts list and contacts can be selected to be attached to the event.

To view the event attachments open the event details view and tap on the attachment to open it.

FYI Contacts attached to the event are not the same as attendees and they will not be notified of or invited to the event.

FYI If the event is assigned to an iOS based calendar photos cannot be attached to the event.

FYI Informant Online is the only sync service that will sync contacts and photos attached to events.

How to Filter Events-A powerful feature in the Informant Calendar Views and the Today View is the ability to filter the information that is being presented. Events can be filtered two ways either by calendar or by tag.

To create filters tap the filter button at the top left of the view, the filter elements will be visible. Select and deselect the calendars or tags to bring them into or to hide them out of view. If you have a filter that you want to use regularly tap the save filter button to create a filter template.

Each of the four Calendar Views have their own filter settings, if you have a filter template you can select that in each of the views to apply that specific filter to the views or you can set an individual unique filter for each view.

When you tap the filter if you see the word filtering that means that a filter is in use.

FYI If you look at your Informant calendar and cannot see your event data the first thing to check is the filter to make sure that no filter is in use.

Birthday Events-There are three methods for entering and managing birthday events in Informant. They are as follows-

iOS- If you are using the iOS Calendars in Informant a read only birthday calendar will be part of the calendar list. This calendar is generated by the device and will contain the birthdays of all the contacts in your device that have birthday information. This calendar cannot be directly edited, the only way to add, change or remove data on this calendar is to edit the contacts themselves. You can remove this calendar from view using the iOS calendar settings mentioned elsewhere in this document or by using the filter option in the Calendar View.

If you tap a birthday event in the devices birthday calendar this action will now open the contact associated with the birthday.

Google- Many Informant customers manage their contacts in their Google account. In this configuration the Google account will create a birthdays calendar based on the contacts information. This can be synced into Informant and viewed. This will be a read only calendar and will need to be edited from the Google website. As with all Informant calendars this calendar can be filtered out of view if desired.

Manually- You can create birthday events and assign them to almost any calendar of your choosing in Informant. It is a good idea to make manually entered birthday events an annual recurring item so that you do not have to re-enter the birthday data every year. You can also assign tags to the birthdays set up this way then set a filter to remove them from view by the tag if you do not desire to see them all of the time.

Tasks-Are to do items. They are meant to be items that are created, and completed, getting them off of the list so to speak. Task management is an important feature of

Informant and one that can be customized from very basic to being extremely complex depending on your preferences and needs.

While a task cannot support attendees as an event can, contacts can be attached to a task by tapping the contacts button at the bottom right of the task editor. If your task is assigned to the iOS Reminders in its sync to/save to field the option to attach contacts is removed as the iOS Reminders database cannot support attachments.

Recurring Tasks-Recurring tasks are tasks that happen over and over again. Recurrences can have patterns ranging from each day to multiple years apart and nearly everything in between. Do you have a task on the second Thursday of every month, or standing to do items each week? Chances are that Informant can accommodate your needs. When you are creating the task, in the task editor you can tap the repeat button. This will open and show all of the "stock" repeat patterns. If none of those quite fit what you are looking for tap the custom option and essentially create your own recurrence pattern.

FYI If your task is assigned to the iOS Reminders, not all of the recurrence patterns will be supported the list will be reduced accordingly.

FYI When setting up a task to be recurring the first choice in the recurrence menu is very important. You will decide if the task, when it is completed, will repeat from the start date, scheduled completion date, or the actual completion date.

Start Date- When the task is completed the new task will use the same start date as the just completed task. Not the literal date but the time frame of the start date. For example if you have a task that starts on Monday and is due Wednesday that would be a 3 day recurrence. If you completed the task on Wednesday the new task would be created on Wednesday but would start 3 days prior.

Assigned Due Date-When this option is chosen the recurring task may be completed prior or after its assigned due date. When the new task is created it will be created to start on the assigned due date of the just completed task. If the task is due on the 22nd of the month but is completed on the 19th the next task in the recurrence will be created starting on the 22nd of the next month.

Completion Date-This is the most commonly used option. What this option does is create the next occurrence of the task on the date that the current task is completed. The task duration is carried through so if the task is a 3 day task then when completed the task will be due 3 days after the current task is completed.

FYI Recurring tasks are displayed differently from recurring events. When you create a recurring event you are able to see that event in the calendar every time it occurs as far out into the future as you have set the pattern to run.

Recurring tasks are shown one at a time. This is because a task has to have an action taken before the next occurrence can be created. If a task is not completed the future occurrence cannot take place. With settings mentioned above determining when a new task will be created in the recurrence pattern there is no way that the tasks can be shown ahead of time.

Task Colors-The tasks in Informant draw their colors from several sources. Tasks that are not synced are displayed in the unsynced task color which can be set in the Informant task settings. Tasks that are synced will be shown in the color of that sync service. The task color for synced tasks is set in the sync service settings in the accounts page of the Informant settings.

If your tasks are assigned to the iOS Reminders the color is set in the Informant settings, accounts, options section.

The other color source for tasks is from the tags. In the Informant settings you can set the tasks to display using the tags color. When in this configuration the tag color overrides the standard task color in the display of the tasks. It is possible to assign multiple tags to a task, the task will show in the color of the first tag that was applied.

Task Syncing-Is explained in the sync section of this document but as a review in this area since we are talking in detail about tasks we'll cover the basics again.

The sync to/save to assignment of the task determines where it will sync. When you tap the sync to/save to field in the task editor a drop down listing of compatible sync services will be visible. Just tap the service that you wish to use.

When you assign a task to the iOS Reminders/Exchange service the task editor will change and will remove all of the fields that the device Reminders database cannot support.

Tasks assigned to the iOS Reminders/Exchange service do not reside in Informant instead they reside in the devices own database and are simply shared with Informant, this means that Informant does not sync with the device Reminders/Exchange tasks it is essentially an interface of that database.

Task Location-Please see the section titled Location, Location, Location, earlier in this guide for details on how this feature works and how to use it.

Task Alarms-When a task is assigned to Informant (sync to/save to field showing anything but iOS Reminders) it is possible to assign multiple alarms. To set an alarm you will need to tap the alarm field in the task editor and set the alarm as needed.

Task Attachments-Tasks assigned to Informant can have two types of attachments. At the bottom of the task editor are three buttons. Tapping the camera button will open the camera app and the photo taken will be attached to the task. The next button is the

photo button. Tapping that button will open the device camera roll and you can select photos to attach to the task. The next button at the bottom of the editor is the contacts button. Tapping this button will open the contacts list and contacts can be selected to be attached to the task.

To view the task attachments view the task details and tap on the attachment to open it.

FYI If the task is assigned to the iOS Reminders, contacts and photos cannot be attached to the task.

FYI Informant Online is the only sync service that will sync contacts and photos attached to tasks.

How to Filter Tasks-A powerful feature in the various Informant views is the ability to filter the information that is being presented. To learn more about filters please see the section titled "Filters Aren't They For Coffee". The Task View filter can only filter by tags.

To create filters tap the button at the top left of the view labeled Filter (Filtering if a filter is already being used), the filter elements will be visible. Select and deselect the tags to bring items into view or to hide them. Once your filter is set to your specifications you can tap the save button to record the filter and activate it.

Checklists- When a task is assigned to Informant pulling down the editor view will reveal two buttons, a checklist and task button. If you tap the checklist button you will be able to put a checklist inside of the task. A checklist is a simple to do list that is related to the master task itself. Checklists can only be used with tasks that are not assigned to the iOS Reminders. Informant Online is the only sync service that can sync the checklists. Other sync services, such as Toodledo, can be used but they will split the checklist items out as standalone tasks.

Smart Filters- If the stock selection of groupings and filters offered in the Task View do not meet your needs you can create what is called a Smart Filter. A Smart Filter is a user defined filter. Tapping the italics "i" next to the smart filters label in the Task View will open up the rule editor. (Please see the section in this user guide titled "Filters Aren't They For Coffee?")

A Smart Filter rule can contain as many elements as you like and be as granular as you wish. Once the rule is saved any tasks in Informant that meet the criteria for your rule will be displayed there.

There are thousands of possible Smart Filter combinations. You may want to experiment with different rules and fine tune your results to your preferences and needs.

You can create as many Smart Filters as you wish.

The Informant Online sync service is the only sync service that will sync the Smart Filters.

Task Editor-The task editor is the most customizable editor in the Informant application. In the task settings, under the editor settings, unused fields can be hidden and using the drag and drop method the editor elements can be re-ordered to your preference.

Multi Select- In the Task View if you need to complete, edit or delete multiple tasks quickly you can tap out to the far right of the tasks and highlight as many tasks as you wish to change. At the bottom of the screen will be a row of buttons that provide different actions. These actions will be performed on all of the selected tasks.

Completed Task Management- What happens to a task when it is completed? It goes into the completed tasks area of the main Task View (this does not include the iOS Reminders). The completed tasks will continue to accumulate here indefinitely.

The problem is that over time you can accumulate thousands of completed tasks which will bloat the database and can ultimately impact performance of the application. Also if you are syncing your tasks having all these completed tasks laying around can be taxing on the sync services. To correct this it is a good idea from time to time to empty the completed tasks grouping. To do this you will need to go into the completed tasks view and pull the view down where you will see a button to delete the completed tasks. Doing this from time to time will help keep the Informant database from bloating and will keep the performance of the application at a high standard.

FYI If you are ever missing a field in the task editor the first thing to do is to check the task editor settings to make sure that the field is not set to be hidden.

Contexts, Tagged, Starred, Next Actions-These items are all elements that you can assign to a task to assist you in sorting, viewing and managing your tasks. We are speaking more generally about them here because Informant customers all use the elements a little differently. Tasks can be grouped, filtered managed and searched by most of these elements. These elements can vary some depending on your task mode and sync service. These items will not be available if your tasks are assigned to the iOS Reminders as they are not supported. If you have Informant set to use the simple task mode the many of these items will be removed. Finally if you are syncing to Google Tasks, many of these elements are not supported by that sync service.

Franklin Covey-The Franklin Covey priority method is supported in Informant. To use this option you will need to go into the task settings, and set the task mode to Franklin Covey. After this is done the Franklin Covey elements will be visible in the task editor. The Franklin Covey elements are not available if the task is assigned to the iOS Reminders and they will only be synced by Informant Sync.

Notes-This is a place in Informant where you can type or speak notes into the application (voice notes are not transcribed). At this time there is no integration with the iOS notes on the device as that is not allowed by the current iOS development rules.

How to use the notes is pretty well up to your needs, imagination and preferences. At this time text notes can be synced via Informant Sync, Toodledo, or Evernote.   Only Informant Sync can sync the voice notes.

In this section things will be explained from the portrait orientation and unless otherwise stated will be referring to text notes.

Creating a Text Note-In the Notes View tap the plus sign in the top right of the view to open the notes editor. The first line to the note will also serve as the title. The title can be edited later after the note is saved.

The cursor will be at the top left of the editor for a new note. Simply start typing to create the note. To save the note tap the button at the top left of the editor it will be pointing back and based on the view you were in when you started the note it might be labeled as all notes or text notes.

Formatting-Just above the keyboard is an important strip of buttons. These buttons can be scrolled left and right. The buttons are used to apply formatting at the start of a note, or sentence. Unless otherwise specified the notes are in a Rich Text Format which supports the formatting options.

Attachments-Notes created in Informant can support photo attachments only. Photos are attached by tapping the button in the format bar that looks like two sheets of paper. Tapping this button will open a dialogue to attach a photo from the devices camera roll. Notes that are synced to Informant via Evernote containing PDF files can view those attachments in Informant.

Printing Notes-It is possible to print notes from the Informant application. At the top of the notes editor is an action button, tap that to open the printing dialogue.

Editing the Note attributes-At the top right of the notes editor is an information button. In this screen the note title, sync, notebook assignment, tags and icons can be added, removed or changed.

Pin to Date- You can assign a note to a specific date by "pinning" it to that date. In the note attribute settings tap the pin to date tab to select a date to pin to. The note will then be visible in the Month View of the Calendar View
Voice Notes-After a voice note is recorded you can tap the information button to see the voice note attributes. There is a field here that you can tap to add a short text note to the voice note providing further information.

Editing the Title of A Voice Note-Tapping the information button of a voice note will reveal the attributes of the note, the first field will show the date, tapping this field will allow you to edit the name of the voice note.

Emailing a Voice Note- Sending a voice note via email can be done by tapping the information button on the note then tapping the envelope icon at the top left of the view.

Emailing a Text Note-Swiping across the text note title from left to right will open a submenu of options, tap the envelope icon to email the note.

FYI A swipe from right to left over a voice note will open the delete button.

FYI A swipe from left to right over the text note title will open the sub menu and tapping the trash can button will delete the note.

FYI Text notes can be multi selected by tapping the far right of the note title, a menu will open at the bottom of the screen and will allow the actions to be applied to all of the selected items.

Gestures- Informant supports many different gestures to accomplish specific operations. Below is a list of the current gestures and a brief description of their functions.

iPhone sync- To manually initiate a sync on the iPhone just use a twisting gesture when the Informant application is open. This will initiate a full sync with any active sync services set up in the application. If you are using the iOS Calendars or iOS Reminders the twist to sync will not initiate a device sync for those items.

Right to left swipe- Depending on the view that you are working in this gesture can serve different purposes for example swiping across the title of a voice note will make the delete button visible.

Left to right swipe- This gesture is view dependent as to what it can do. For example, in the task or event editors a left to right swipe will toggle the Natural Language Parser on or off, swiping across an event or task title will open a submenu of other operations that can be applied to the item.

Pinching Gesture- In the Day(s) View you can adjust the view to show as few as one day or as many as 10 days. This is done with a pinching gesture on that view. Pinching in or out will bring up a window telling you how many days are set to display. This window will change as you pinch in either direction always letting you know how many days are displayed. When you get to the number of days that you are seeking just lift your fingers from the display and your selection will remain.

Tap-Hold- This is one of the oldest gestures in Informant, in the Calendar Views, (Month View, Week View, and day view) you can tap and hold on a date and open a menu that

will allow you to create a new event, task or note, for that specific date. You can also use this gesture to apply a color to a specific day in the Month View and Week View.

Select- This option works in the text fields in Informant and operates as it does in any other iOS application. If you hold the text a menu to select the text will open and copying will put that text onto the device clipboard. This does only work in the text fields.

Copy/Paste- After selecting your text and copying to the clipboard you can paste that data into another text field inside of Informant. Tap and hold the field you wish to paste to. When the menu opens tap paste to insert the text.

Drag and Drop- In certain Informant views you can use the drag and drop gesture to organize your data. In the Day(s) View timed events and tasks can be selected with a tap/hold and moved around the time grid. Letting go will drop the item in that time slot. The item itself will be automatically edited with the new times and date if applicable.

In the Task View, inside of a Informant based project tasks can be manually ordered with a drag and drop operation. To do this tap and hold the task at the far right and move it up or down in the list of tasks then let go to drop it in that position. Some things in the Task View that will effect this behavior will be the next action handling settings for the project and the task mode that is in use. The manually set task order is not a syncable attribute so if you are syncing your tasks they will not maintain the manual order between devices. Also in the Task View in the main view if your tasks are sorted by date you can drag tasks to other dates, keeping in mind that in doing so only the due date will be changed when the task is dropped, the start date will remain fixed.

Scrolling- All of the views in Informant support some variation of scrolling, in the Calendar Views that can be up and down or left and right depending on the specific Calendar View being used. The Task, Notes, and Today Views can all be scrolled up and down to view the data.

Troubleshooting- Listed below near the end of this document is the troubleshooting section the items are culled from our support cases and are the most common concerns that we see in support. Informant is a top quality application, it is extensively tested and re-tested before any release. Even with the best of intentions bugs can show up. All software will have a hiccup once in a while, it is a fact of the life in the digital world that we live in. Sometimes it is the fault of the software, other times it is an outside factor such as syncing, and still other times user error can cause things to go haywire. Our trouble shooting section should help with many of those instances.
Immediately below are sections that deal with some of the most advanced features in Informant please take a look as they can help you to maximize what Informant can do for you.

Location, Location, Location…

Written by Alex Kac for Informant 3.5 (borrowed with permission from his blog and still applicable in Informant 4.0)

NEW Locations now use geofencing instead if cellular triangulation for significant location changes. This provides more accurate results without increasing the battery drain on the device.

A favorite feature in Informant is how we handle locations. We originally started as one of the first apps that supported adding locations to task contexts, and we've taken that lead and expanded it to a host of location capabilities with version 3.0.

Live Location Search

We introduced this search in version 3.2 and have improved it. When you are creating or editing an event or task, typing brings up an auto-complete menu that you can select to pick a location. You can continue to type and ignore the menu, or you can scroll through the menu and pick an item. When you pick an item its not just getting the name of the location and address, you're also allowing PI to save its coordinates. This becomes important for ETA and Location maps as we can use that information to more quickly and accurately get directions, ETA, etc.

 However if you ignore the menu and just keep typing, PI can still use that information. For example if you type in "Starbucks", PI will still try to use that to find the closest Starbucks at the time in ETA or Location maps.

You can also swipe on the location field to the left and turn it off.

Location Maps
On the events section header you may see a location button at times.
Tapping on this button brings up our Location Maps. Here you can look at your schedule via the map. If you have multiple places to go, then you can see where they are, or if there are multiple matches (in my case below - its Starbucks), it'll give you all those locations listed.
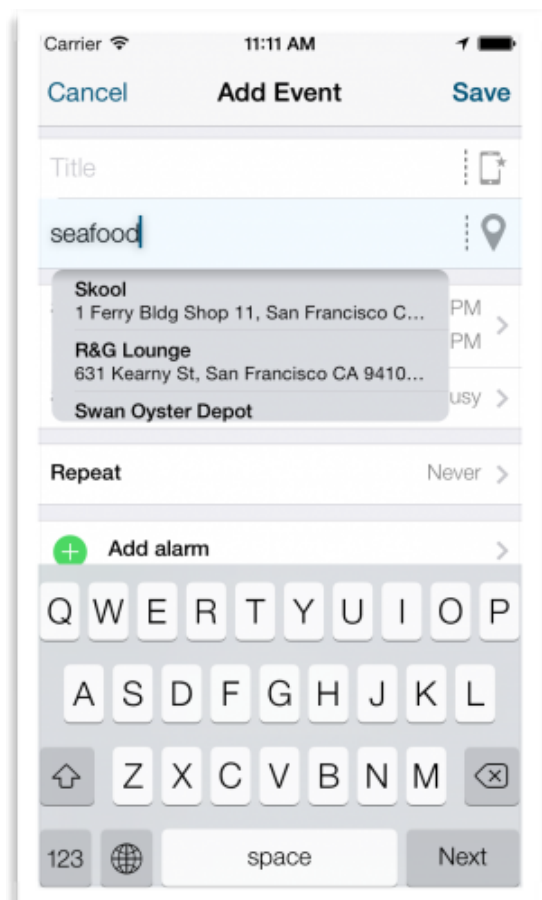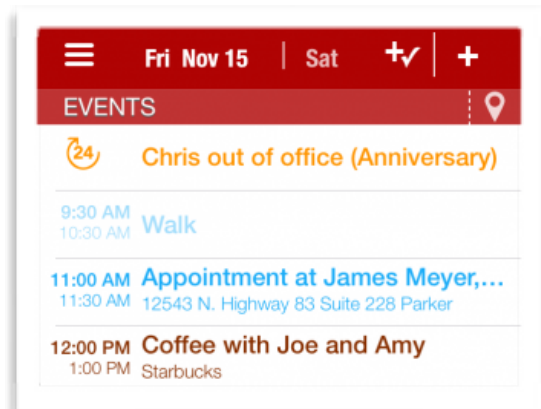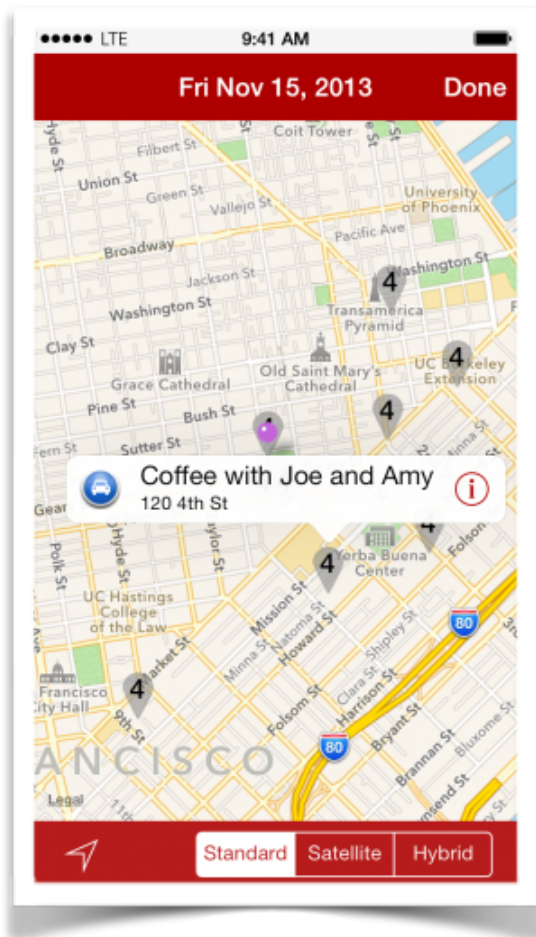
You can tap on each location for the event info, or the car button to get driving directions with Google Maps, Apple Maps, or Navigon.

Today ETA

This is one of my favorite features wherewe've got a lot more planned to improve it in future versions (walking directions, directions home at the end of the day, etc..). Essentially this is where it all comes together.

The ETA feature looks for your next event that has a location. If the location already has coordinates in it (because you used our Live location search), then we simply pass the location to Apple for its ETA. If there is an address or just a name, we do a search for the location based on your current location and then get the ETA.
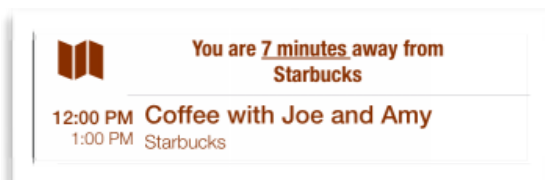
Want to get rid of the ETA because it doesn't apply? You've got 3 ways:

1   Swipe to the left on the ETA and select Hide

2   Turn it off for specific calendars

3   Turn it off completely
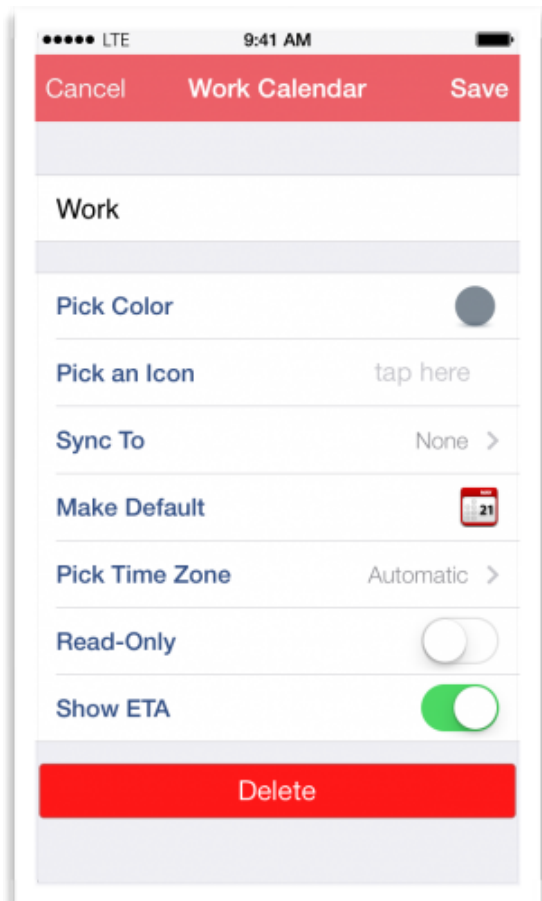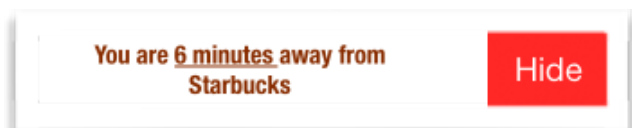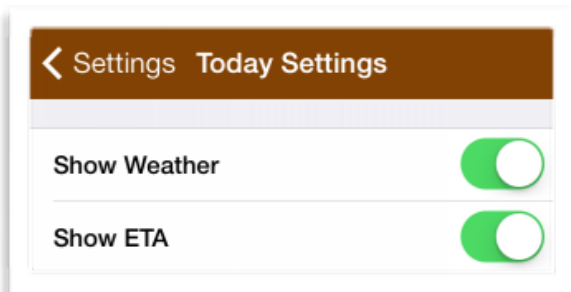
Context Locations
The idea here is that you can have a location - say Home Depot or a nearby town - that you have a bunch of tasks to do. By adding a location to a context, you can simply add tasks to that context and when you're near that location, PI will alert you that you are near the context. It makes it easy to simply assign a task to a context and be notified.

To begin, simply go to the Contexts list and hit Edit. Then tap on a context, and select "Location Alarms". The map will come up and you can search and pick a spot.

Or tap/hold a location and pick the dropped pin.

Then save that context. Easy peasy 😊

From here on out, we use battery-saving "Significant Location Change" alerts from iOS to determine if you are near the area. This tracks cell-tower triangulation changes, so its not using the GPS.
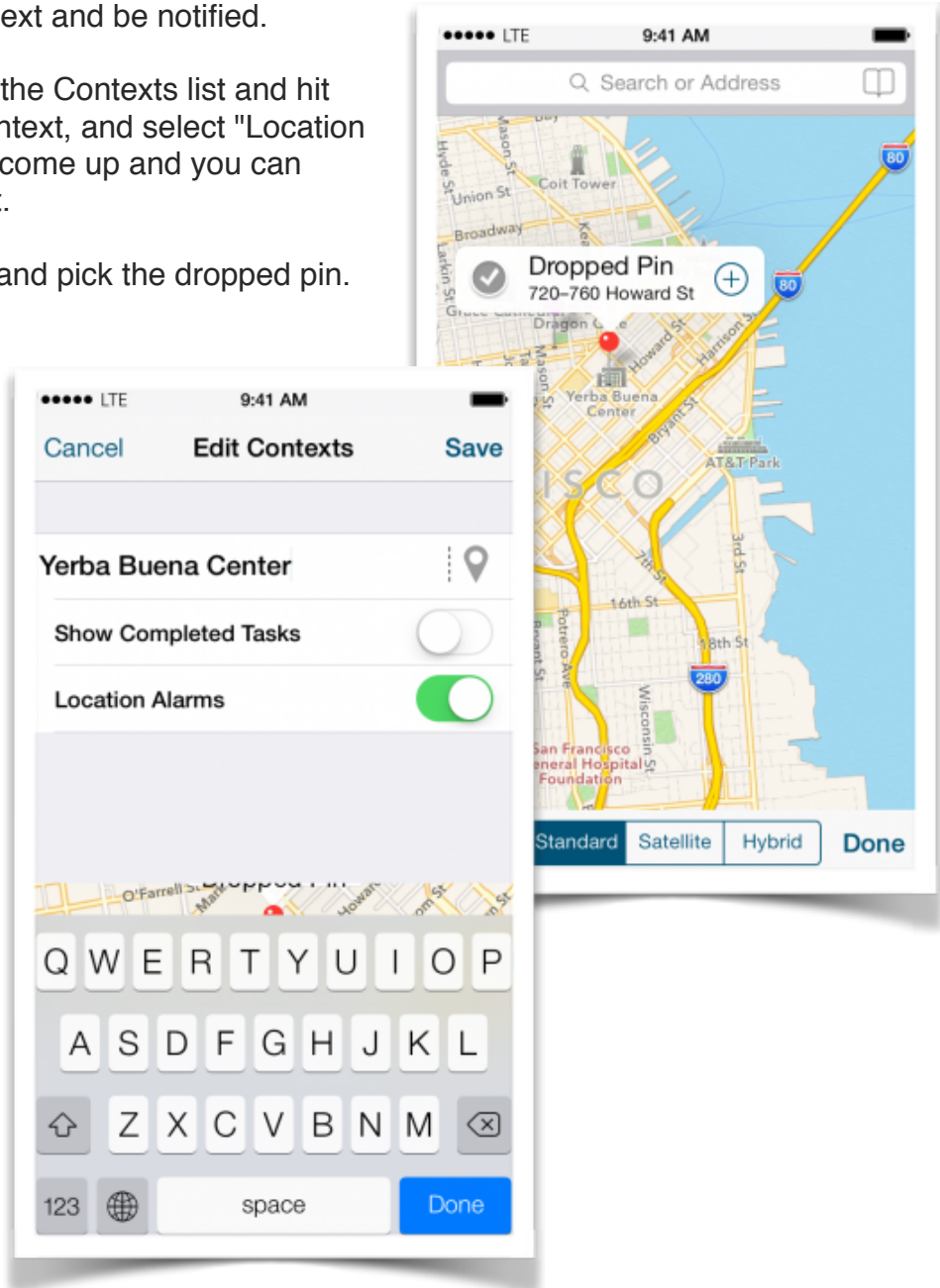
Filters, Aren't Those For Coffee?

Written by Chris McSorley (written for Informant 3.5 but applicable to Informant 4.0 borrowed with permission from his blog)

NEW Saved calendar filters can now be edited and can be activated by geofenced or iBeacon locations. See the filter menu in Informant to activate.

Formerly titled Filters Part 1and Filters Part 2

Saved Filters - what are they??

Before we get into that - perhaps we should first define the problem we set out to solve. If you have a calendar for yourself, a calendar for your wife, for each kid, the a College Football calendar, a US Holiday Calendar, a couple business-related calendars, and perhaps a few others. While all this information is certainly handy, it's often overload when looking at your month on an iPhone-sized screen. The simple solution is to just filter out the calendars you don't want to see right now...but that certainly gets to be a hassle if you are constantly changing what information you want to look at throughout the day (perhaps at work, you only want to focus on work stuff, at home you want to focus on personal stuff, etc).

Thus the concept of Saved Filters was born. With Saved Filters, you can create different "sets" of calendars and save each set. From there, you can quickly switch between those sets (or "saved filters") with just a couple taps. If you juggle several calendars, we think you're going to love this.

The Setup
First, we'll start with our familiar Calendar View:

 If you tap-and-hold on the "hamburger" button (the one that is circled), that's a handy shortcut that will immediately bring up the filter screen:
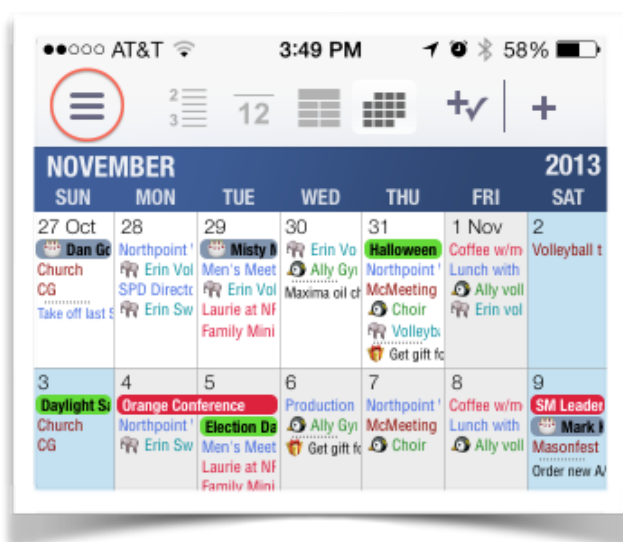
From there (like on many calendar apps), you'd typically just select / deselect the calendars you wanted to see and hit the "Set" button. (quick side note - here's a bonus tip: PI has also always had the feature that if

you tapped on the circled arrow next to the calendar name, it immediately deselects all other calendars and takes you immediately back to the Calendar View with just that 1 calendar selected).

However, the new button we want to focus on here is the circled one at the bottom titled "Save this Filter". That lets you set a name for the current filter that you have just defined and it will take you back to your Calendar View with that filter set. Now here's where the magic happens. Suppose you want to go back to showing all your other calendars...or you want to switch to a different filter. Now that we have a saved filter, when you tap-hold on the "hamburger" button again, instead of just going straight to the filter screen, Informant shows you a menu that lets you select any of your saved filters, show all calendars, or lets you get back into the filter screen to create a new filter.

In the example case, there are 2 filters I toggle between quite a bit: My "Standard Filter" that has all my family stuff on it, and the "Just Me" filter that contains only my calendars:

 So now, I can focus on just my stuff during the day, but with literally two taps, I can have all my family stuff immediately show up in my calendar as well.

If you've hated all the clutter in your calendar but have avoided using filters because it's too cumbersome to switch back and forth between what you do and don't want to see - this feature will change your life. Ok, that was dramatic...but it's still pretty darn cool.
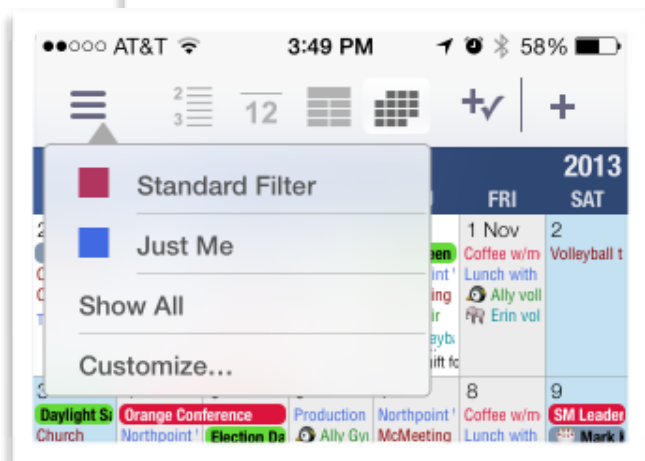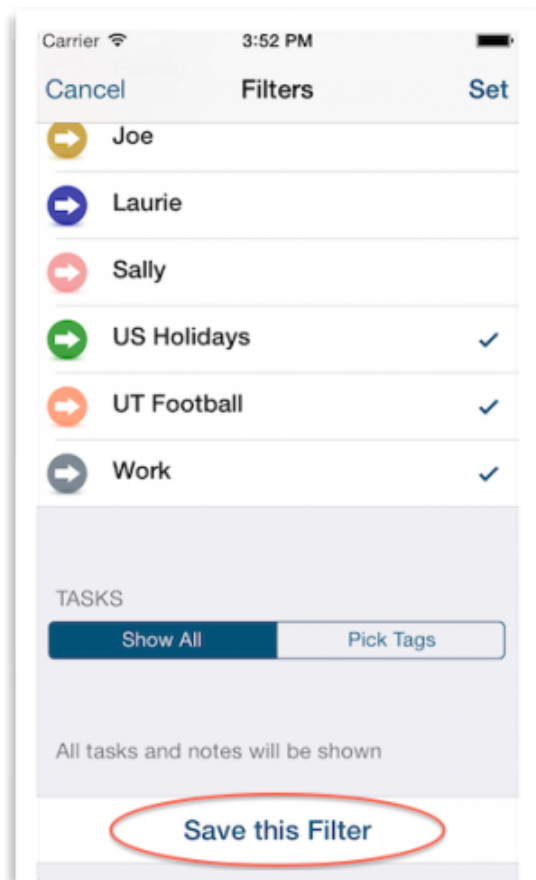
Filters Part 2

HERE Conventional wisdom says that the sequel is almost never as good as the original. You have to figure out how to capture the magic of the first one, but offer

something compelling and new at the same time. A few months ago, I wrote a post titled "Filters Part 1" which was a riveting overview of our handy "Saved Filter" feature in Informant (if you missed it, check it out). Well, now I'm back with the long-awaited filter sequel - only this time we'll be talking about Smart Filters. Hopefully I can break the "Hollywood Sequel" reputation.

How smart are your filters?
For those who haven't heard of Informant's Smart Filters, let me back up a bit. On our Task tab, we have several pre-defined filters that are quite useful: All Active, In Progress, Overdue, etc.

For the record, yes I really have 25 overdue tasks. Ironically, completing this blog post is one of them.

It quickly occurred to us that while these filters are a handy way of focusing in on a specific "set" of tasks, we couldn't possibly imagine all the different ways that people might want to filter their tasks. Some people might want to see all their tasks that are due within the next week. Some might have their own definition of "In Progress" that is slightly different than ours.

What about a quick way to see all your "high priority" tasks? This quickly led us to the concept of Smart Filters where you get to define your very own custom set of rules for the tasks that you want to see at a glance.

For instance, you could create a filter of "Tasks I really care about" that looks something like this:

This filter would show all tasks that are EITHER starred OR tasks that are high priority and due today.
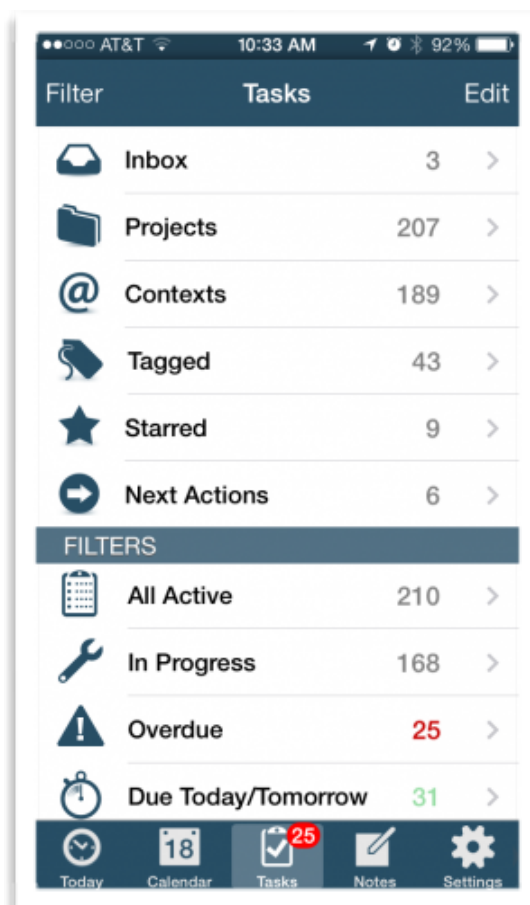
Getting Started
NOTE: if you've already started using Smart Filters, you can probably skip this section and move on to some of the good stuff below…
Below the Filter section, you'll see a header called "Smart Filters". On that header is a little "i" button.

Tapping the "i" will bring up the Smart Filter editor. From there you can make a brand new Smart Filter or edit an existing one.

Suppose every Monday, we need to turn in a report to our boss outlining all the tasks we completed in the previous week. Simple - let's just make a Smart Filter that allows us to instantly retrieve all the tasks we have completed in the last 7 days. Tap the '+' icon in the top right corner to make a new Smart Filter and give it the name "Work Completed Last Week". From there, we can add our rules. Tap "Add rule" to add our first rule. In the "Rule Builder" screen, make the following selections:

- Completed Date
- was within the last
- 7 days (alternatively, you could pick 1 week)

Once we hit Save, we get a screen like this:

Back out of the Rules Editor, save your changes and you now have a brand new custom filter that shows up on our Task Tab called "Work Completed Last Week". Tapping that filter will always show you all the tasks you have completed in the last week. Easy Peasy!
So I'm sure at this point many of you are thinking that's great and all, but you need to be a bit more precise…you don't want ALL the tasks you completed in the last week, just the ones you completed at work (more specifically, the tasks where you have set the "context" to "work"). Well, I'm glad you mentioned that. Let's go back in and edit this Smart Filter of ours. Notice
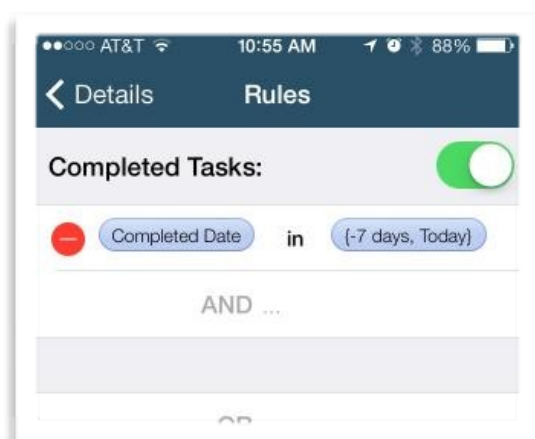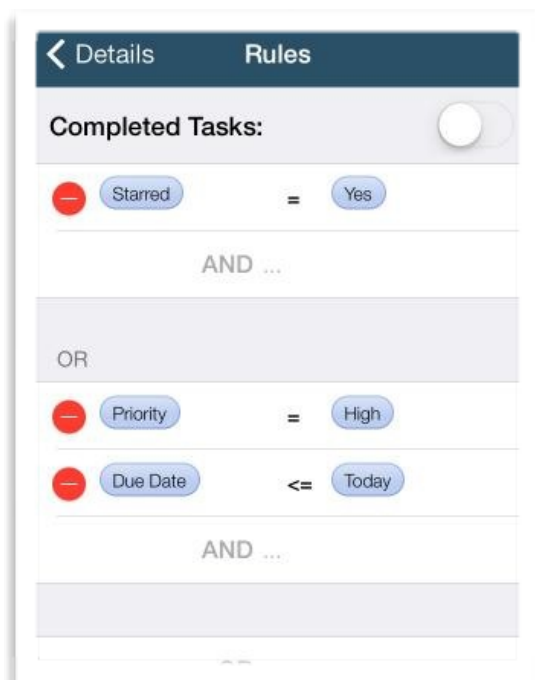
in the Rules Editor, there are options to add an "AND" clause or an "OR" clause. In this case, we want to tap "AND", then we can add the additional restriction that:

- Context
- is equal to
- Work

(NOTE: this assumes you have created a Context called "Work"). When you're done, your rule now looks like this:

Sadly, you say, your life is even slightly more complicated than that. Your work can either be done at work or on your computer. So you actually need to find all that tasks that have been completed in the last week that have a context of either "Work" OR "Computer". Well, interestingly enough, you have just inadvertently stumbled onto a little gotcha in how our Rules Editor currently works. But before I get into the details of that - allow me make a small "logical" diversion…

Like they say in the Ford commercials, AND is better than OR
Ok, maybe not "better", per se, but in terms of the "order of operations", a logical AND must be handled before a logical OR (just like multiplication takes priority over addition). Meaning if you say something like this:

Completed Date is within the last 7 days AND context = "Work" OR context = "Computer"

That will get processed like this:

(Completed Date is within the last 7 days AND context = "Work") OR (context = "Computer")

which is not what we want (we'd end up getting every single task that has a context of "Computer" regardless of when/if it was completed).   Ideally, the Rules Editor would let you put in your own parenthesis so that you could directly construct the rule that you really want, which is:

(Completed Date is within the last 7 days) AND (context = "Work" OR context = "Computer")

As we designed this Rules Editor, I quickly learned it was very hard to create a super-flexible interface for a Rules Editor that would fit in the size of an iPhone screen. That's not to say that we've given up, but it is to say that in its current form, we made a few tradeoffs. Specifically, the Rules Editor is designed to let you easily build rules that are:

- • Simple AND clauses
- • Simple OR clauses
- • A bunch of AND clauses that are ORed together

This covers a lot (if not most) of the common use cases.

The downside is that there are a few isolated cases where it becomes a little bit cumbersome to build the exact rule you want - specifically the one we're dealing with right now. To get around this "order of operations" / UI problem, you need to repeat the AND clause within each OR clause. If you can remember back to those fun Algebra days in school where you learned the "FOIL" method, it's a lot like that. For instance, if you had this:

5 * (4 + 3)
you can rewrite that as:
(5*4) + (5*3)

In the same way, we can rewrite our above rule to be this and we'll get exactly what we want:

Completed Date was within the last 7 days
AND context is Work
OR
Completed Date was within the last 7 days
AND context is computer

Thus, in PI, the rule looks like this:

One more thing…

A little while back we added a subtle but powerful option for Smart Filters. Many people already know about this, but if you haven't discovered it yet, it's definitely worth mentioning here. Once you build all your custom Smart Filters, you can go into the Settings tab, then to the "Today Settings". In there, you can then put those custom Smart Filters directly onto your Today Tab. A lot of people "live" on the Today Tab, so this can be an incredibly powerful feature to be able to create custom filters of tasks that show up in the view that shows you everything you care about "Today".

Detailed Troubleshooting and Backup Information-

Each item below can have many causes, this is a basic list of common items and how to correct them. If none of them fit your present situation please check the bottom of this section for "What to do in case something goes wrong".

Syncing-

We could write an entire section on this. Nearly 90% of all support cases are related to syncing data. Some common scenarios are listed below

Syncing is a simple process to get data in and out of Informant the data is assigned to a sync service, the sync service then uploads the Informant data and downloads the data from the sync service making sure that everything is appropriately updated during the process.

Error-My data will sync into Informant but the data I create in Informant won't sync to my sync service.

Answer- The first thing to check in this situation is the sync assignment of the data not syncing. For Events this is determined by the calendar that the event is assigned to. If you are syncing your data to Google Calendar but you assign the event to a calendar that is not syncing, that event will not be synced to Google. In the event editor you can tap the calendar field to see a list of calendars, this list will also tell you the sync service (if any) that the calendar is designated to sync to. Once the event is assigned to a calendar designated to sync it should sync without issue. If it does not please contact support.

For Tasks and Notes that aren't syncing please check the sync to field in the items editor. Tapping this field will show a list of compatible sync services that are active in Informant, select the service you wish to use and tap the save button to initiate a sync. If the tasks or notes don't sync please contact support.

Error-Informant is reporting sync error and won't sync.

Answer-Go into the Informant settings, advanced and tap the clean database button. Once that process is completed try the sync again. If the sync fails please contact support.

Error-None of my data is syncing.

Answer-Please check that the data is properly assigned to the sync services, for events they must be assigned to a calendar that is designated to sync to the service that you wish to use. Tasks and notes must show the desired sync service in their sync to fields.

Error-After syncing for the first time I have a lot of extra data, some of it looks duplicated?

Answer-If you added a device with Informant to your existing sync loop (all devices plus the sync account used by Informant on your other devices) and the new device had a lot of the same data (manually entered) on the first sync the data from the new device will be synced as new because the sync service had never seen it before. The solution is to manually correct the data in the sync source (except Informant Online or when using gSyncit with any sync service), then do a reset sync in the Informant accounts, sync account settings, select the first reset option at the top of the list which will force Informant to remove its existing incorrect data and replace it with the corrected data from the sync service.

If your specific sync concern is not shown here please open a case to support.

Data Loss-

Data Loss (Excluding Exchange Data)-Similar to syncing in that there can be several reasons for your data to not be visible when you open the Informant application, it doesn't always mean that your data is lost.

If you are using the iOS Calendar or iOS Reminders database in Informant and your data is missing please check the following
1. Please open the calendar app or reminders app that came with your device and see if the data is still present there. If it is please proceed to step 2.

2. Please open your device settings->privacy->calendar-> and move the Informant slider to on. Repeat for reminders.

3. Please open Informant and tap settings->accounts->calendar app and make sure that the slider is set to on. Repeat for reminders.

If these steps do not restore your iOS/Exchange calendar data into Informant please open a case to support.

Backing Up and Restoring Data-

Backing Up and Restoring Data- Informant has many backup options. Informant can back up your data internally by going into the Informant settings, advanced, backup/restore and tap make backup now. This will take a snapshot of the Informant database at that moment and save it.

NEW Automatic backups can be configured in the backup settings of Informant, you can set the backup interval. With each new backup that is made the oldest backup will be

removed. For example of you tell Informant to hold 7 days of backups each day that a backup is performed the 8th backup file will be removed.

Another backup option is to use the built in Dropbox backup. In the Informant settings, advanced, tap the Dropbox tab, sign into your Dropbox account and tap the option to backup. As with the internal backup a snapshot will be taken of the database and uploaded to Dropbox.

You can also create and keep your own backup archive. When you go into the Informant settings, advanced, backup restore and tap the make backup button you can then email that backup file to yourself. Simply tap the backup file and from the menu select the email option.

In your email client you can then set up an archive folder and collect these emails with the backup files attached. Its an easy way to store your data outside of the application. We advise not keeping more than a weeks worth of backup files as the Informant data gets out of date quickly and usually there is not much value in restoring a backup file that is older than a week.

Now that you've gotten this data backed up how do you restore it should that become necessary?

To restore from an internal backup file in Informant please go into the Informant settings, advanced, backup/restore and tap the file you wish to restore. In the menu that opens select restore. The current database in Informant will be overwritten with data from the backup file.

If your data is backed up in Dropbox, go into the Informant settings, advanced, Dropbox, and tap the download button. This will download the backup file and restore it.

Restoring your data from an emailed backup file is a simple process. The steps are outlined below.

1. In your email archive of backups select the email that you wish to restore from and copy the backup file to your computer desktop.

2. On the desktop of your computer rename the backup file to pim.informantdata

3. Double tap the front button on your device, find the Informant application and flick it up to terminate the application from running. (this is a critical step)

4. Connect your device to iTunes via the usb cable. In iTunes click on the device, apps tab, and scroll down the page to the file sharing area.

5. Click on the Informant icon. This will open up a file list. In that file list delete the files pim.informantdata, pim.informantdata-shm and pim.informantdata-wal

6. Add the pim.informantdata file from your desktop to the file list.

7. Restart the Informant application, the data in the backup file should now be present.

FYI The data from the iOS Calendar, Reminders and Contacts are not part of the Informant backup. Events, tasks, and notes created in and assigned to the Informant database will be part of the backup file.

FYI Restoring a backup file will overwrite all data existing in Informant before the restore except the device calendar events, reminders and contacts as they are not a part of the Informant backup file.

FYI If the only backups of your data are the ones inside of the Informant application, deleting and reinstalling the application will delete the backup files as well.

If your device has an unexpected issue resulting in data loss and the backup files are stored in the Informant application they may be lost as well.

FYI Syncing your data is not necessarily a reliable backup means. Data being synced is actually updating the database. If there is an error in the database that is causing a data loss there is a good possibility that the error could be synced and cause damage to the data in the sync service.

A backup is a snapshot of the data at a given moment and is not amended in any way.

If you cannot locate your data or you cannot recover your data from its present source please open a case to support for further assistance.

Data Loss (Exchange based calendars and events)-

Data Loss (Exchange based calendars and events) Some customers will see a recurring issue where their Exchange calendars and their data will simply disappear from the Informant application but the data will still be visible in the devices own calendar application.

To restore the data back into view in Informant please go into the Informant settings, accounts, options, calendars to use and make sure that all of the calendars are selected. Once that is done the data will immediately return to view in Informant.

Each calendar coming into Informant from the device via the Exchange sync is assigned a unique id number by Exchange. As the user this number is not shown it is used by the device and Informant internally to identify the various calendars in the iOS calendar database.

Some Exchange servers are changing these unique identification numbers, when this occurs and the device syncs to Exchange the calendars are presented to Informant with unique id numbers that don't match what Informant already has stored. Informant comes to the conclusion that none of the previous calendars exist anymore so it removes them which makes it appear that the data is lost when viewing in Informant. The reality is that data is fully intact but Informant thinks that the calendars are new and they have to be turned on in order to be viewed. We are working on a solution to this in a future release.

Crashing-

Crashing-There are many different reasons Informant can crash, they range from a difficulty encountered during syncing to the device being low on available ram, to something being wrong with the database. If Informant is crashing when you do a specific set of steps try the following before contacting support. Please go into the Informant settings, advanced, and tap the database cleaner button. Then try the same steps again. If the Informant crashes again please use the steps below to get your crash logs and attach those when you open your case to support.

You can find crash logs here:
- Mac OS X : ~/Library/Logs/CrashReporter/MobileDevice/ <DEVICE_NAME>
- Windows XP: C:\Documents and Settings\<USERNAME>\Application Data\Apple computer\Logs\CrashReporter/<DEVICE_NAME>
- Windows 7/8 or Vista: C:\Users\<USERNAME>\AppData\Roaming\Apple computer\Logs\CrashReporter/MobileDevice/<DEVICE_NAME>

Zip the crash logs up and attach them. Regular ZIP only please. No RAR, zipx.

Attaching the crash logs will help us to more quickly identify the reason for the crash.

If the application is crashing before you can try the clean database option please use the steps above to access the crash logs and attach them to your support case.

App Freezing-

Freezing- This is different from a crash in that the application never really stops running, the app may stop for a time but it will stay in view and it will resume normal operations. Again as with crashing there can be many reasons for this. The most common cause occurs when a sync is in progress that is syncing a large amount of data, Informant can sometimes encounter a bottleneck when this occurs. The solution is to check your Informant data for items such as a large number (over 1000) of completed tasks, or if you are using the iOS Calendar application support you may want to consider changing the device settings to sync less of the devices calendar data.

For the completed tasks the solution is to go into the Informant Task View, completed tasks, pull down that view, and tap the button to delete the completed tasks. (This operation cannot be reversed).

To reduce the amount of data that the device calendars are syncing you will need to go into the device settings, mail contacts calendar, and scroll down to the bottom of the page. Just up from the bottom of the page is a heading for syncing, the setting to determine how much data to sync will be right there.

Once the setting is changed the calendar in Informant will show the reduced amount of data immediately.

Alarm Issues-

Alarms- There are a couple of common alarm issues that Informant users most often see.

The first one is the alarm issue of alarms not firing or firing but not under the Informant banner.

If you see either of these issues please check your data in Informant, for events you will want to check the calendar assignment, if you see that the event is assigned to one of the device calendars or if you see that a task shows iOS Reminders as its sync to the alarms will fire from the devices native calendar and reminders apps. This is because the data is assigned to the iOS Calendar database. At this time the iOS does not recognize when 3rd party applications such as Informant are used to create the events and tasks so it fires the alarms from the native calendar and reminders applications even though the events and tasks were created in Informant.

The second part to this that Informant customers see is no alarm notifications. If you see this and your tasks/events are assigned to the iOS calendar database you will need to go into the device settings, notifications and enable all of the notifications for the iOS calendar application and reminders application. This will allow them to fire under the native applications.

If your alarms are stray, meaning alarms from tasks or events past, or if you have alarms that are not firing correctly the first step is to go into the Informant settings, advanced, database management, and tap the reset alarms button.

Finally if your data is not assigned to to the iOS calendar or reminders but is instead assigned to the Informant database and your alarms are not firing please check the following-

In the Informant settings, advanced, allow alarm notifications for, please make sure that the sliders are set to on.

In the Informant calendar settings, alarm notification sound please make sure that an alarm notification sound is selected.

Next please check the Informant task settings, alarm notification sound and please make sure that an alarm notification sound is selected.

Also please check the device notification settings and make sure that all notification settings are turned on for the Informant application.

If the steps above do not correct the alarm operations, please go into the Informant settings, advanced, logging and turn on the alarm logging. When the alarm issue occurs again, please tap the feedback tab in Informant, and open a new case to support and use the option to attach logs. They will help us to resolve your concern more quickly as we will be able to see what Informant is doing with the alarms.

Title Field Changing Data-

Title Field Changing Data- Informant has a feature called Natural Language Parsing (NLP). This feature takes your title input for an event or task , and treats it as a plain-text description of the event. This involves identifying time/date, location, and recurrence information in the text, and using it to populate the corresponding fields of the event. If you wish to disable this feature please do the following. In a task or event editor swipe from right to left. When the title field is no longer pulsing blue/white the feature is disabled.

Location Field Changing Data-

Location Field Changing Data- When entering a location for a task or an event, if the Location Search feature is turned on Informant will search its location information and attempt to fill in the location for you. To disable this feature please open an event or task editor and swipe across the contact field from right to left. Once the field is not flashing blue and white the option has been disabled in the entire application.

No Microphone for Voice Data Entry-

No Microphone For Data Entry-If your keyboard in Informant is displayed without a microphone button please check the following.

1. Please verify that you are not using the iPhone 4. This feature uses components of Siri so the device must be Siri equipped.

2. Please go into the device settings, privacy. microphone, and make sure that the Informant slider is set to on.

Now the microphone should be visible and useable. If not please open a case to support.

Not Able To Add Contacts to The Contacts List-

Not able to add contacts to a contacts list- This is a known issue that is occurring at the iOS (device) level and it cannot be corrected in Informant. We have alerted Apple to the issue. This does not afflict all customers, the classic symptom is that you have created a contacts list and wish to add contacts to in and when you select one to apply to the list it won't save. If you do see this condition we do apologize but at this time there is not a way to work around this.

Search Results Not Complete-

Search Results Not Complete- Informant searches the database by event, task, or notes title, and contacts by the contact name or business name. The search does not check task, event, notes or contacts content beyond the items mentioned above.

If your data is primarily based in the device calendar or reminders (iOS data) the search will go back fifteen years and will search all data in the future.
Additional resources for Informant help-

Additional help resources- The following items can provide further assistance if you have questions regarding how to use a feature, or if further troubleshooting is needed for your specific concern.

The Informant knowledge base- http://webis.kayako.com/Knowledgebase/List/Index/5

The Informant Forums- http://www.pocketinformant.com/Forums/

Our social media outlets Facebook https://www.facebook.com/pages/Pocket-Informant/26952634798?ref=br_tf

Twitter- https://twitter.com/webis_mobile

You can always open a case to support. Cases can be opened via our support page online. http://webis.kayako.com

Or you can open a support case from within the application. To do this please tap the feedback tab inside of the application and tap the option to open a case to support.

Our preference is that whenever possible you open your support case from within the application. When you do this Informant adds notes about itself that are very helpful with diagnostics and advice.

Our support center is located in the United States central time zone. Support cases are answered Monday through Friday from 7:30am to 7:30pm. We strive to respond to all support cases within 2-4 hours. Mondays, the day after a holiday, or immediately following a new release the response time can be delayed by as much as one day due to volume. Every customer is important to us and we will make every possible effort within the course of a normal business day to establish contact with you.

Keys To A Good Support Case-

To have your case addressed as easily and quickly as possible the following are some pointers that can streamline the process.

1. If possible open the support case from the feedback tab of the application.

2. Clearly state what your concern is with details

3. Include items such as what view you were working in, what specific operation you were doing, if you can tell us the steps to reproduce the error.

4. Please be civil.

Why No Telephone Support?-

This is a common question that we receive and the answers are pretty simple. First Informant is a complex and specialized application and there would not be a good way to farm out our telephone support because of that. Which would mean that we would have to create, staff and open a call center. This is a cost prohibitive option for many reasons. First is that to do so would require a large and immediate price increase for Informant, and very likely a per incident charge for each call just to break even. Neither of those are very popular with our Informant customers.

Practically speaking not many of our most common support cases can be resolved over the telephone. We often need to look at logs or screenshots, do research and occasionally meet with engineering to resolve support cases, none of those can be efficiently done over the telephone.

Further, the time that a support tech is on the phone can be better spent working through multiple customer cases via email. In the time of a 10-30 minute support call a support tech can answer 5-10 support cases over email.

That is why we don't provide telephone support but we strive to provide the best quality and most efficient support possible communicating via email.

In Conclusion-

We would like to thank you for your choice to be a Informant customer. Whether you are "newbie" to the application or you've been a Informant user "since back in the iPaq days" we value all of you.

We strive to offer the highest quality and most complete products at an affordable price.

All products are tested throughly before release but as is the nature of software bugs will be found, our goal is keep these to a minimum while not creating new ones.

If you have a suggestion, want to offer an opinion or simply want to communicate to the person in charge, all of us are available. The main engineers of Informant are always listening to customer feedback, and ideas. It has been this valuable customer feedback that has driven many of the features and innovations that are contained in the current Informant application with more to come in the future.

Informant is a full featured application and one of the most powerful applications available for information management. While being a very capable application we have worked very hard to make the application easy to use and intuitive. When questions arise or in the event that something does not work correctly we are here to assist you and to make your experience as positive as possible.

Please don't forget to rate Informant and to leave feedback in the App Store, please tell others about your Informant experience. In the unlikely event that you have had a negative experience all that we ask is that you be fair with your feedback, please mention the efforts that our support team made to assist you.

Every customer is important to us and we want every interaction to be a positive one.

Thank your for choosing Informant and let us know how we can help you!

Screenshot Index Of Event and Task Views Plus-

On the following pages is and index of screenshots for your reference. Each screenshot will have a descriptive name.

TodayView-iPhone
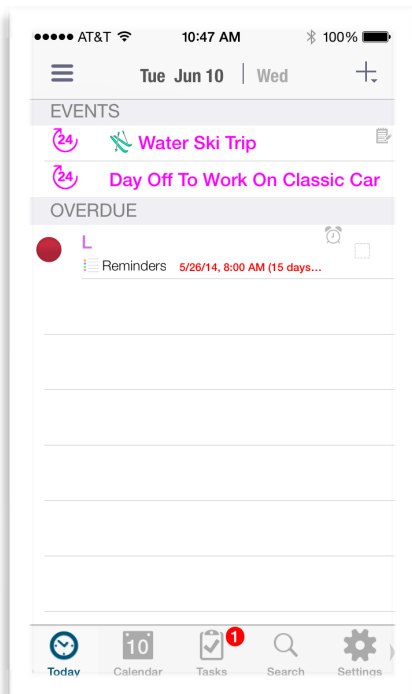
Today View
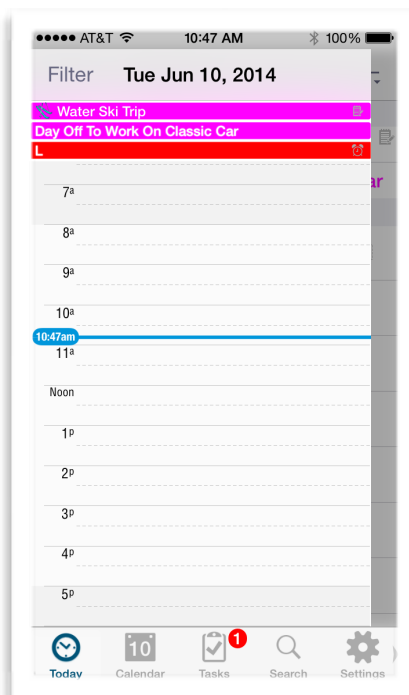
Today View Slideout
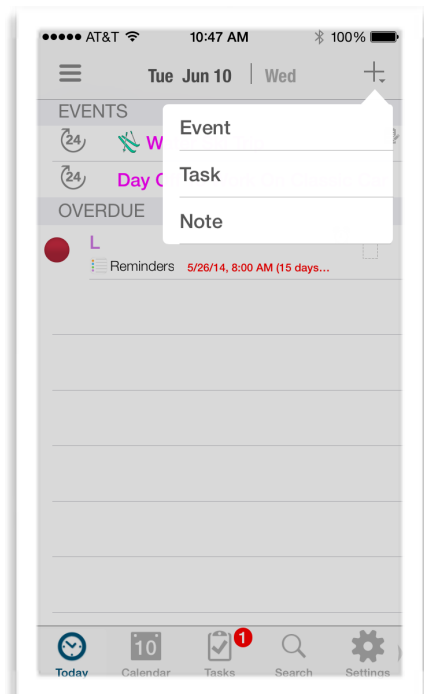
Today View Add

Today View-Ipad
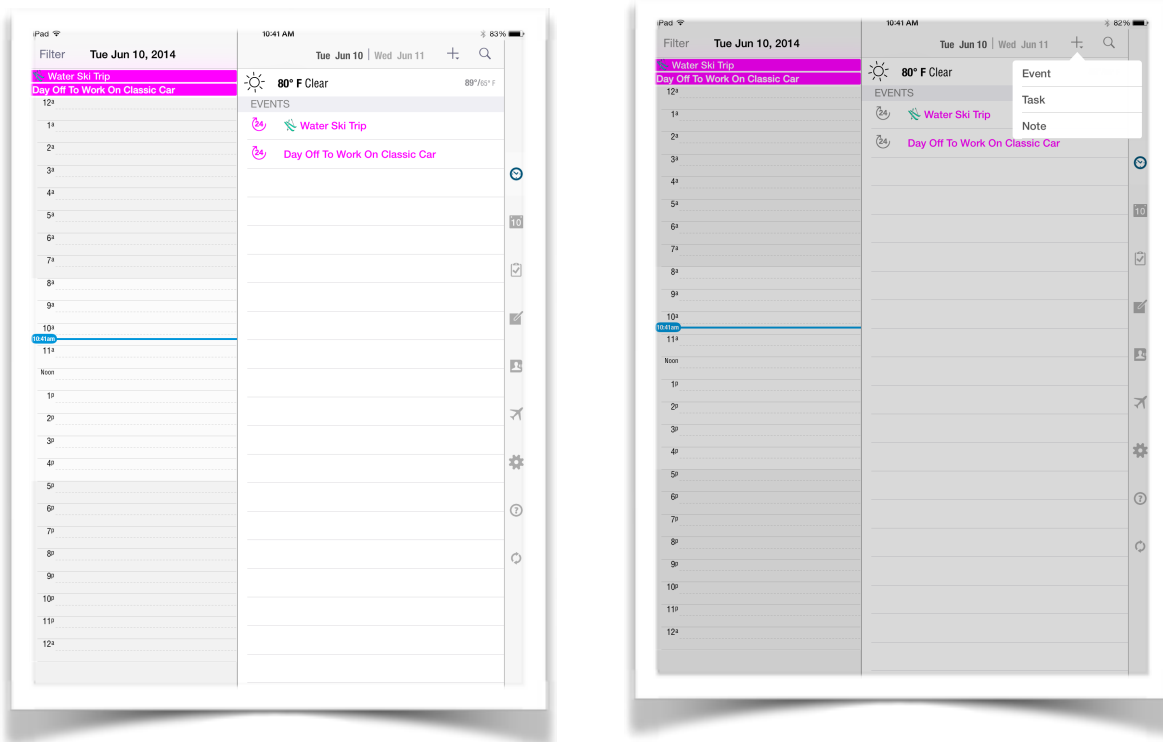
Today View And Today View Add

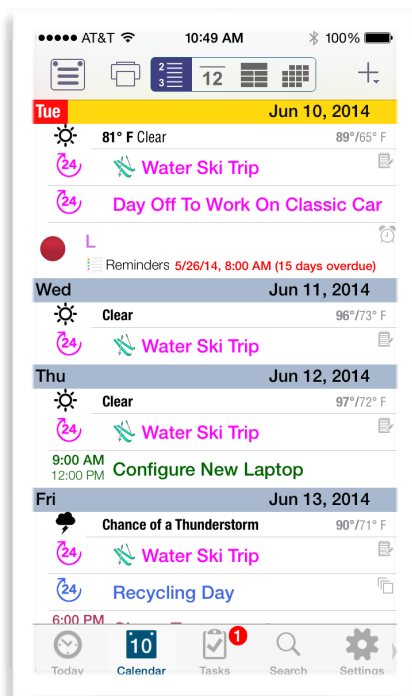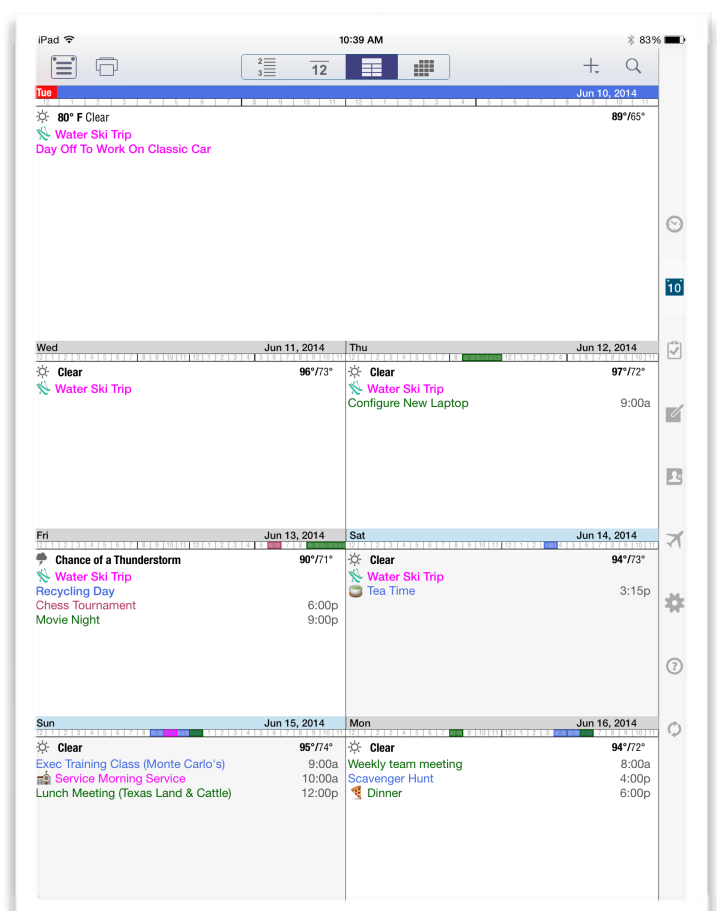## Calendar View-Iphone
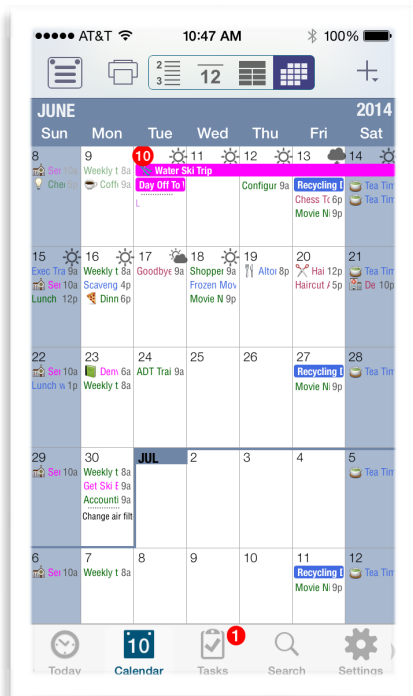
Month View
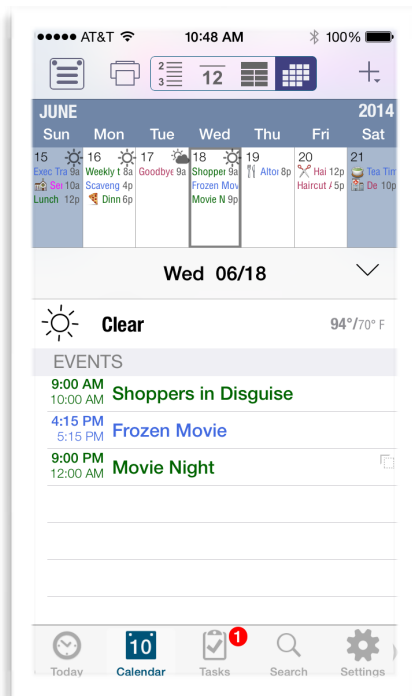
Month View Detail
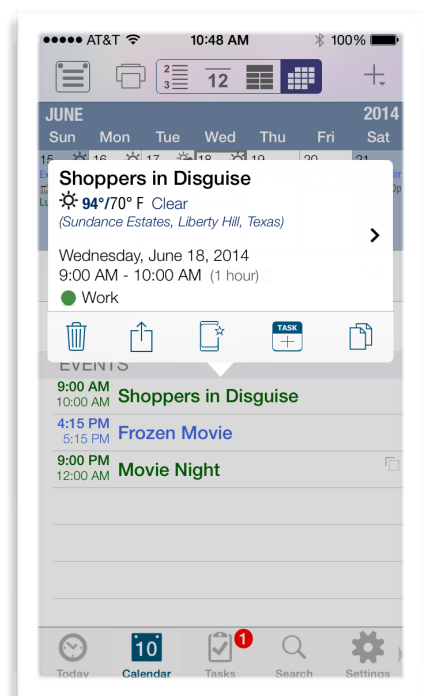
Event View
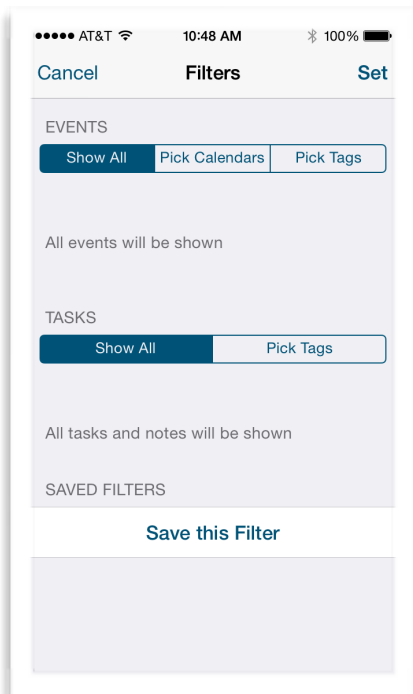
Filter View
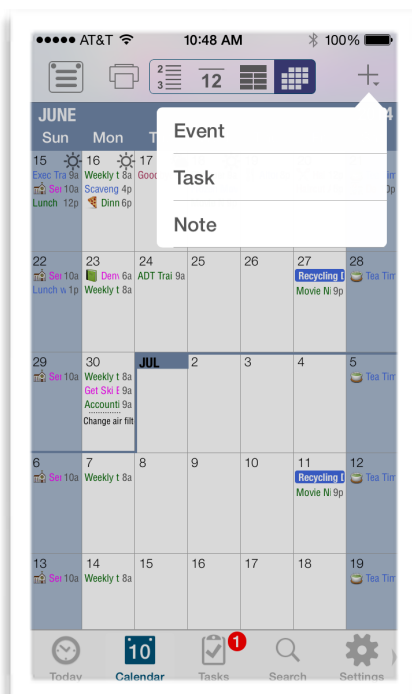
Add View
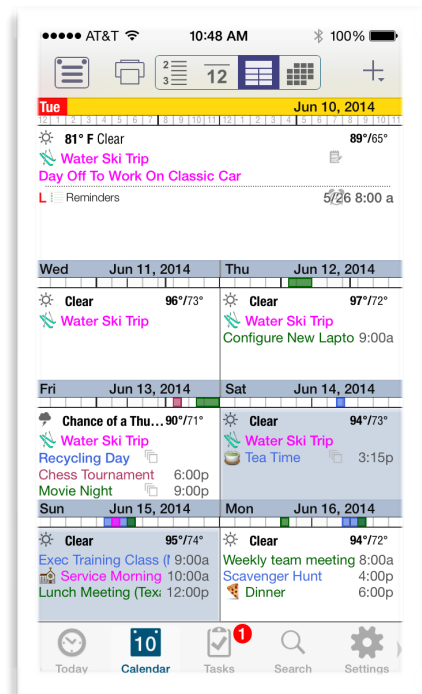
Week View
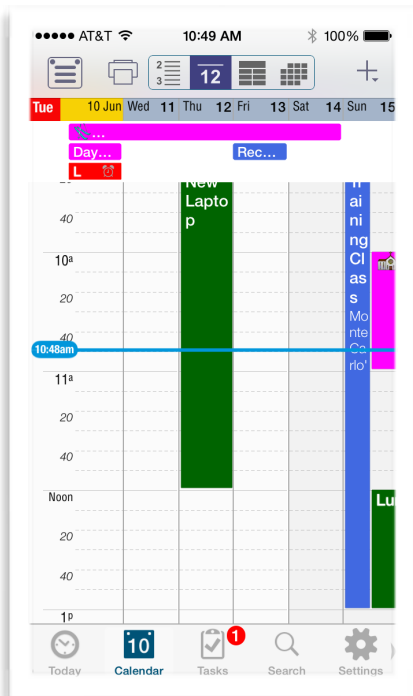
Day View

List View

Calendar View-Ipad
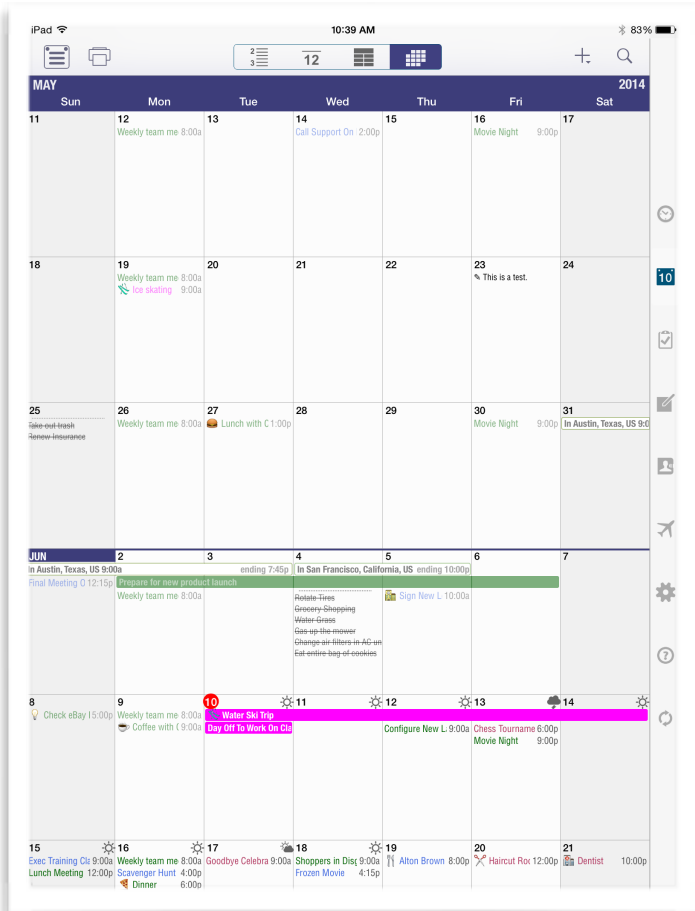
Month View And Week View
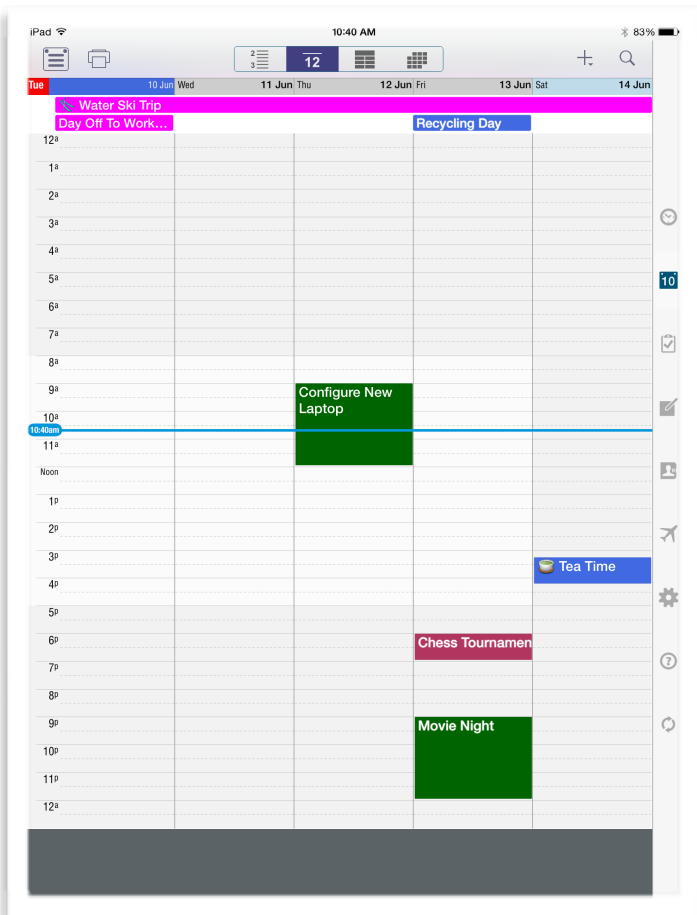
Day View
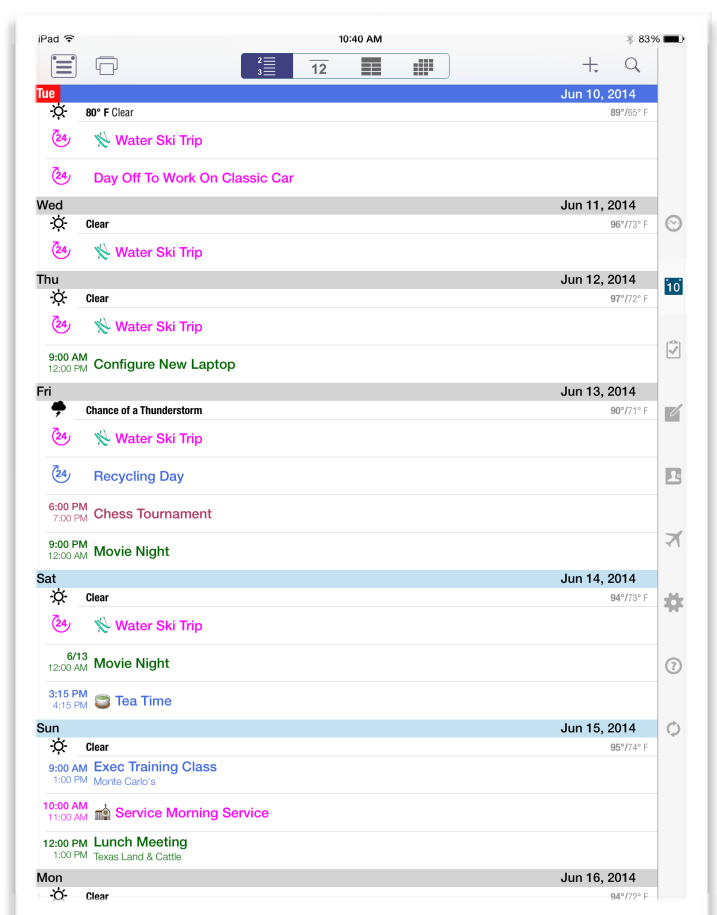
List View
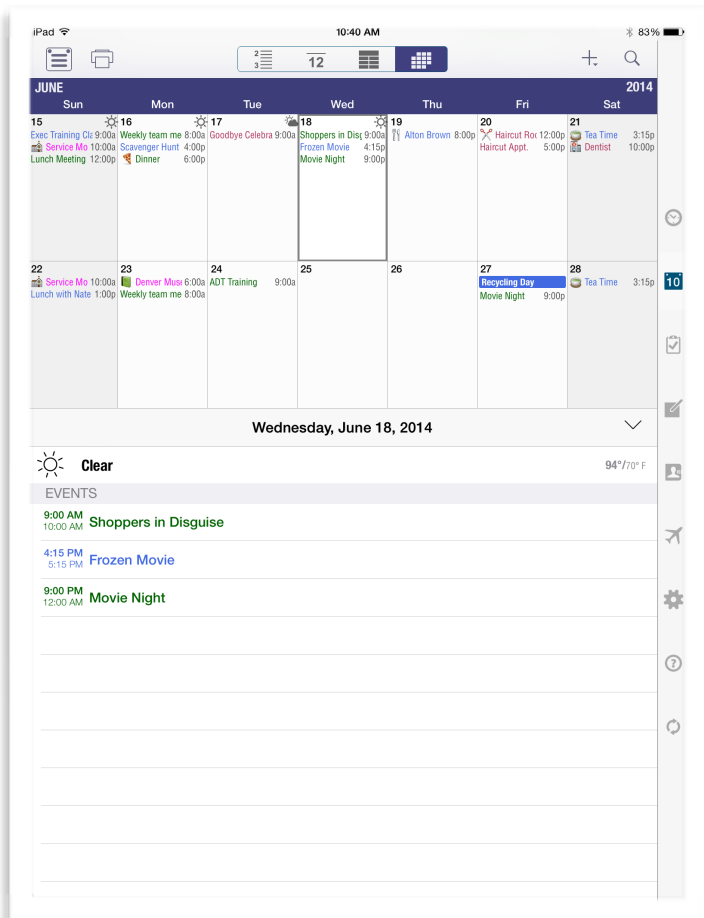
Month View Detail
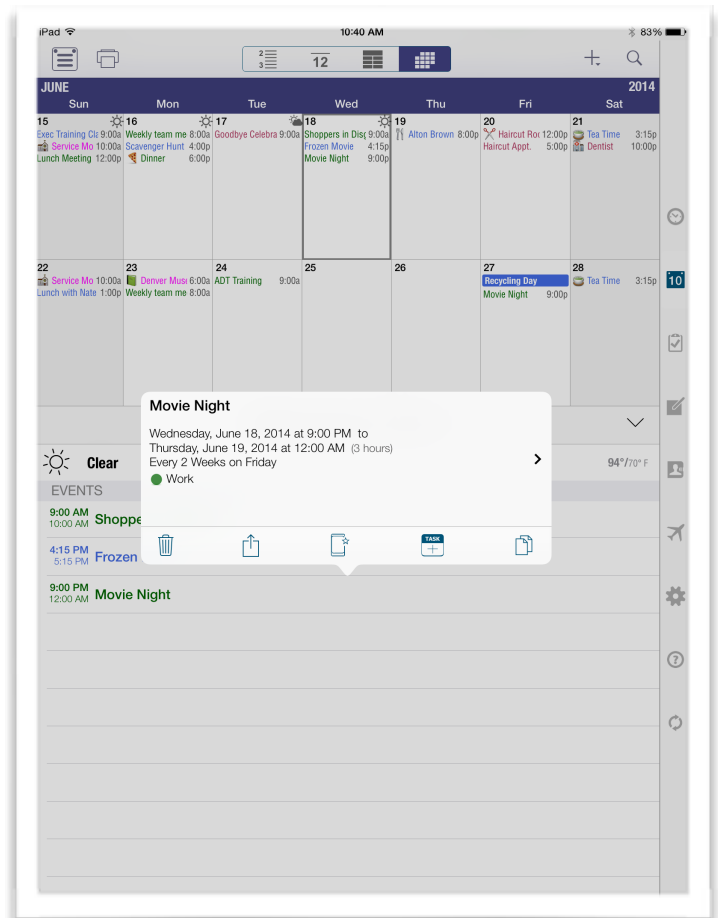
Event Detail View

Task View- iPhone

Task View   Task View Slideout   Task View Sort Menu

Task View-iPad
        Task View   Task View Menu

iPhone Misc-
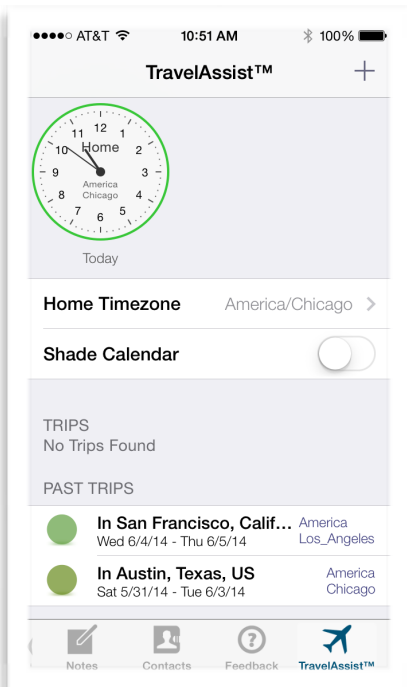
Travel Assist
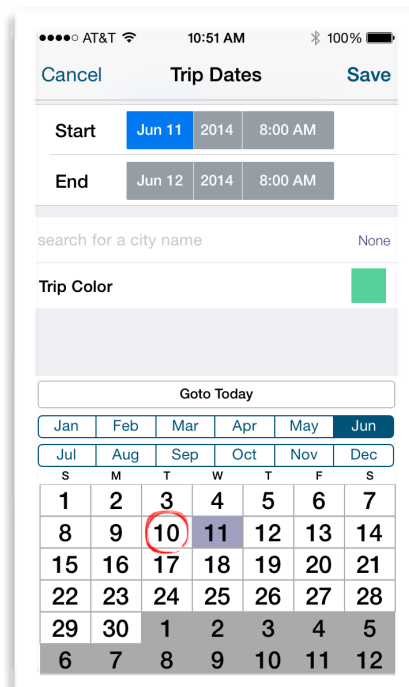
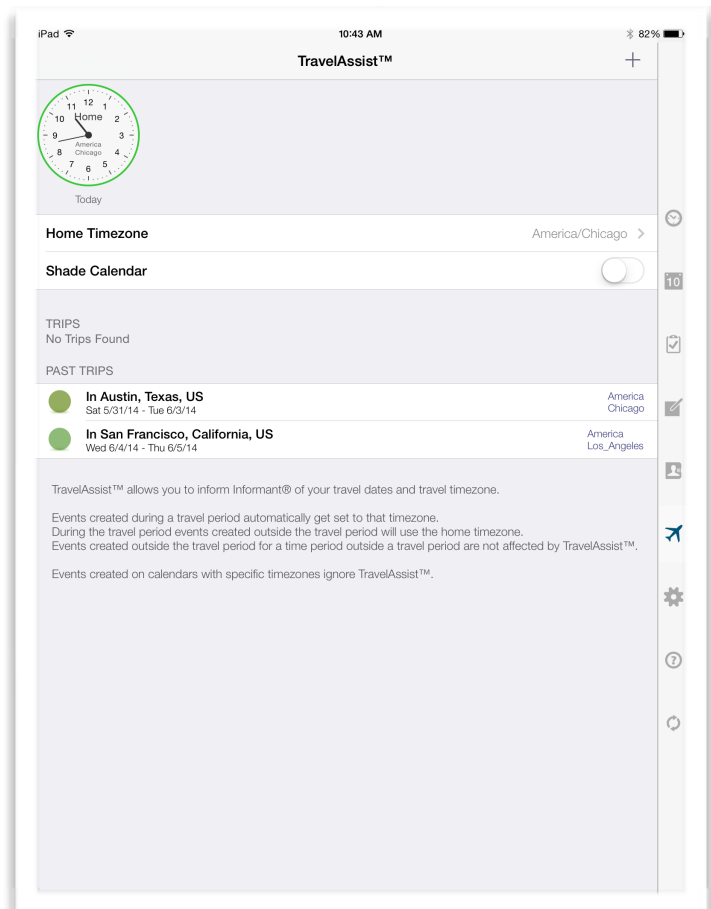Travel Assist Date Chooser
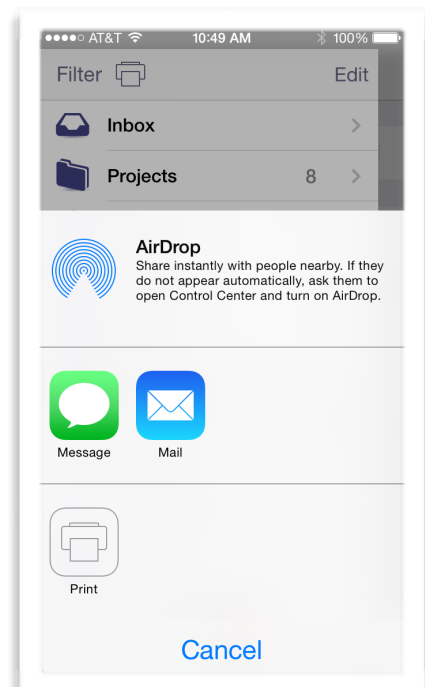
Task Print Screen
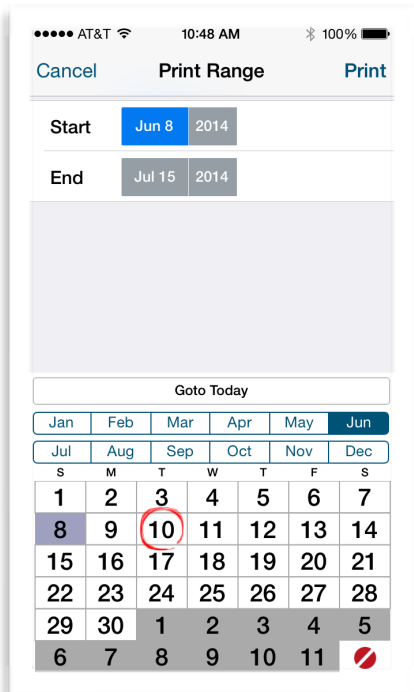
Event Print Screen
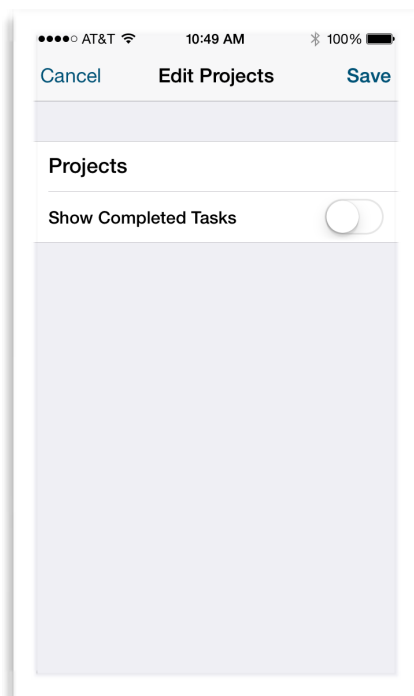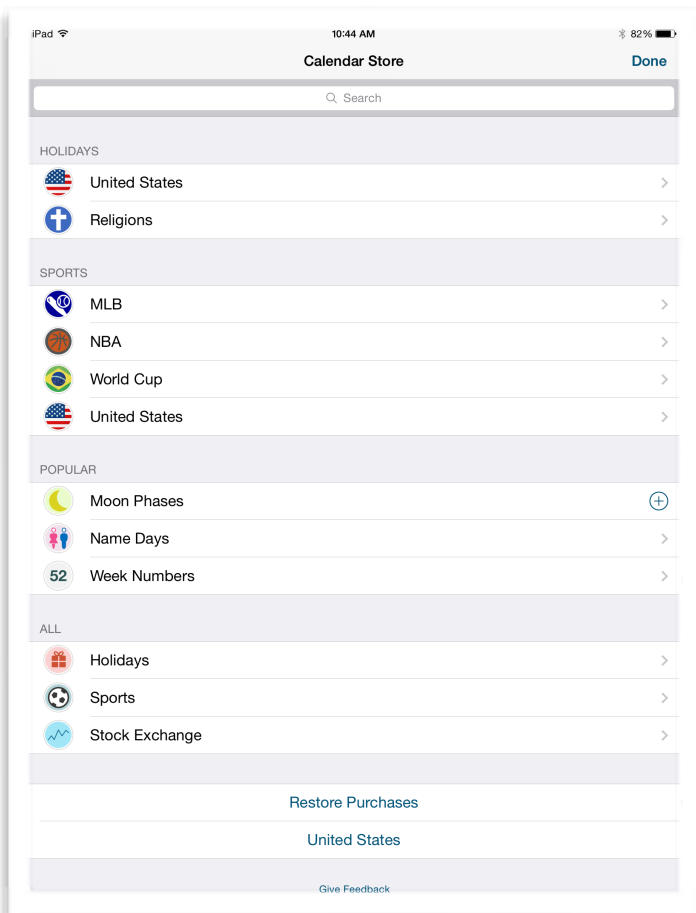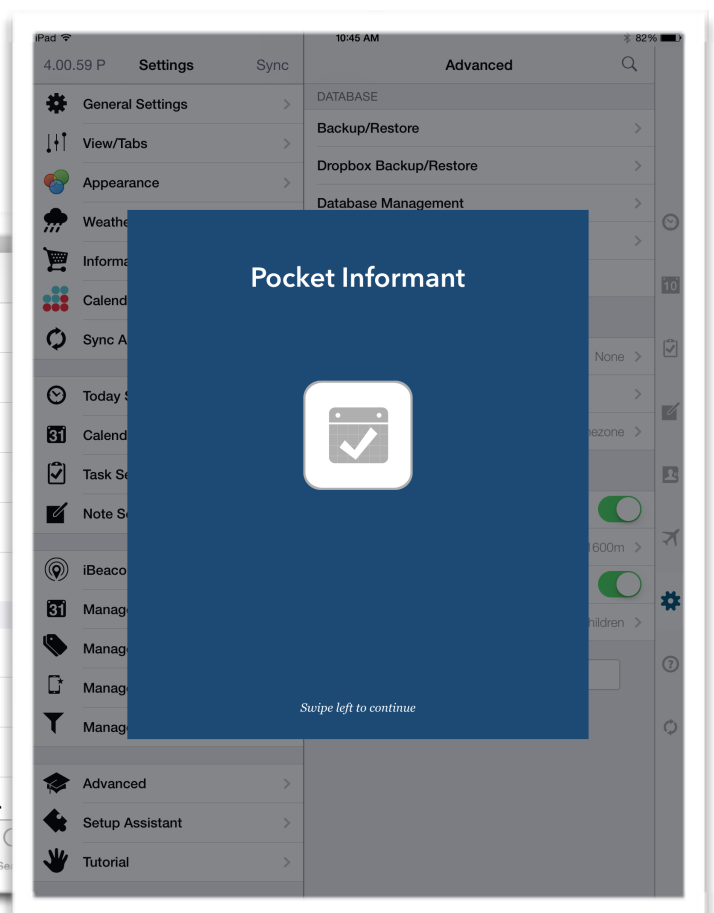

Project Edit Screen

iPad Misc-
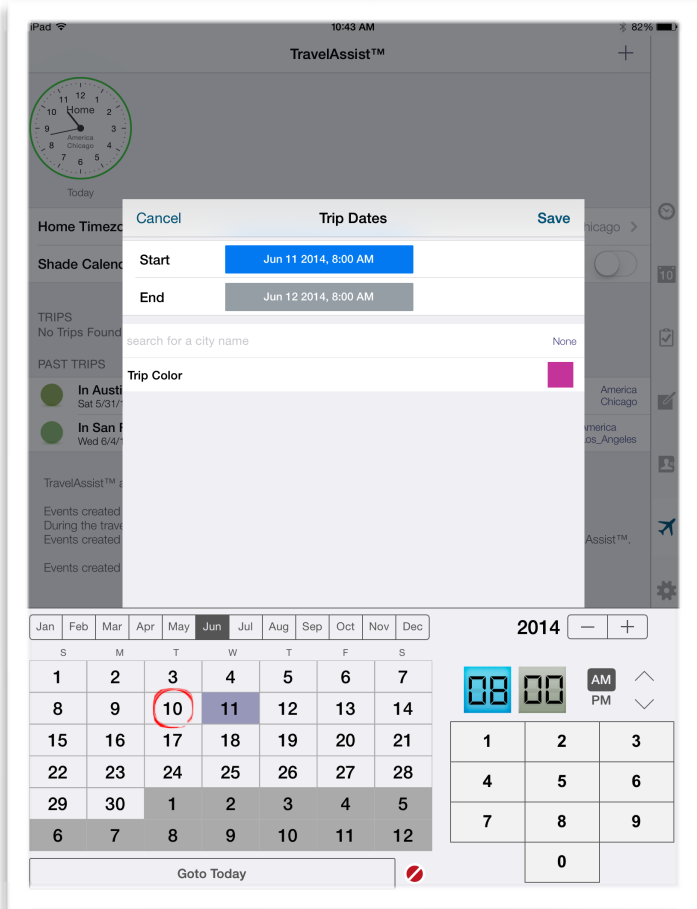
Travel Assist Date Chooser

Travel Assist

Calendar Store

Set Up Assistant