

# IOS USER GUIDE

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## INTRODUCTION

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Welcome to Informant, your one-stop shop for keeping your life organized.

Informant 5 is a calendar-based application that helps you keep track of events, tasks, and all manner of daily activities you need to keep up with.

Informant 5 is a free application available in the Apple App Store. This application will read information from your Apple and Google calendars and keep everything organized for you all in one place. With the free version of the application you will get the ability to show those calendars with limited view options within the app.

In order to unlock all features within the app, Informant 5 offers a subscription service called Informant Sync. The subscription is \$24.99 (USD), charged annually. An Informant Sync subscription allows you to unlock all features of the application including task view, contacts, and notes. It will also allow you to sync your calendar to any device that is also logged into the same Informant Sync account.

Informant Sync is offered with a free 2-week trial upon creation of your account.

Informant 5 offers technical support Monday through Friday from 8:00am to 4:00pm Eastern Standard Time. You can reach out directly from the app or using this link:

<https://faq.pocketinformant.com/hc/en/3-pocket-informant/contact-us/>

Here you will find helpful FAQs for all of our features and a Contact Us button at the bottom of the page for further assistance.

## GETTING STARTED

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Download the Informant app on your Apple device:

1. Open the App Store on your device
2. Select the Search magnifying glass on the bottom right
3. Type in Informant 5 Calendar
4. Select "Get" or if you have had Informant installed previously, tap the cloud icon

You will need to ensure that Informant has permissions enabled on your iOS device so that it can have access to calendars, Reminders, etc.

To do this:

1. Open your device Settings (Not Informant)
2. Scroll down and find Informant 5
3. Enable all permissions

Once you've given permissions, you will be able to add events and tasks (Tasks will require an Informant Sync subscription) to your calendar as well as adding alarms, notes, and attendees.

With an active Informant Sync subscription, you'll be able to sync your calendars across any device that is logged into your Informant Sync account.

## INFORMANT SYNC & WHY SUBSCRIPTION-BASED PRICING

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An Informant Sync subscription is the sync service used with Informant 5. An Informant Sync subscription is \$24.99/yr (USD) with an option to do \$5/monthly as well. Included is a free two week trial period simply by signing up and trying it out.

*\*\*Subscription is not required to have a great experience with Informant 5 on any platform, but it's the best premium sync solution between devices using Informant 5\*\**

An Informant Sync subscription gives you full access to Informant 5 without limitation. This means you'll be able to sync not only your calendars, events, and tasks, but also tags, smart filters, notes, voice notes, locations, settings, triggers, and more between any device using Informant 5.

You'll be able to sync your iPhone/iPad to your Android phone or Tablet. There are also options for syncing with MacOS and Outlook. (Additional one time purchase required for MacOS) Informant Sync is designed to be cross-platform, fast, and efficient on mobile networks.

Informant 5 offers more syncable customization options than you can get with your Apple or Google Calendars. With tags, color options, contexts, and more icons, Informant 5 offers options for every productivity need.

To subscribe to Informant online use the link below:

<https://pocketinformant.com/products/informantsync/>

You can also subscribe directly in the Informant Application once your subscription has expired by tapping on the "Add 1 Year" option. From here, you'll be able to select \$24.99 Yearly, \$6.99 Quarterly, and \$2.99 monthly.

### ***Why a subscription and not a one-time purchase?***

Moving to a subscription model for our pricing has been the best to be able to offer constant updates and upgrades for our customers.

We have had Pocket Informant on the App Store for over 12 years now, and in all that time, this is only the 2nd "paid upgrade" we've ever done. During those years, however, we have delivered non-stop updates, including several major feature upgrades. We think that's pretty amazing for a single (relatively inexpensive) purchase.

Unfortunately, Apple doesn't allow "upgrade pricing" on apps in the App Store...there is absolutely no mechanism to implement it. So the only options are to either give away free updates for life, or release a separate app as the "next major version" (like we did with Informant 5). And when a new app is released, Apple doesn't offer any way for us to sell that app at a discounted rate to existing customers. We have had numerous conversations with Apple about this and the model that they (and most others in the industry) are moving to is subscription - and as best as we can tell, they have no intentions of ever implementing the "traditional" software upgrade model that existed prior to the App Store (nor do I think you'll see the traditional upgrade model appear on Android App Stores either). So, this is the model that we need to work within.

While we would love to be able to give away updates to Informant for free, we do have ongoing costs on our side and it's simply not sustainable for us to not address those (developers, support, server costs, weather subscription costs, etc). After a few years of internal discussion, fighting, planning, and observing the trends around us, we finally settled on our current model that we think is fairly unique and blends together the best of all worlds...and allows us to be sustainable moving forward.

You may remember pre-iOS days, that the pricing back then was \$30-\$40 with annual paid upgrades. As we look around today on iOS, we see "calendaring" and "task management" type apps priced between \$5 - \$40 and none of them have the breadth or unique blend of features that we offer, so we feel like at \$25, we're pretty darn competitive, but more importantly, we feel like it's a really good value for our customers...and even more importantly, it puts us in a position where we can continue to deliver some really great new features that we have on our roadmap and we can release them whenever they're ready without having to hold them back for the "next major upgrade".

## WHY USE INFORMANT SYNC?

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Informant Sync offers many syncable customization options that aren't available in Google or Apple Calendars.

With Informant Sync you are able to add icons to your reminders sent from Apple. After you create a Reminder in Apple Reminders, you can open that Reminder in Informant and change the color of the reminder and add icons.

Informant Sync also offers the use of Contexts (can we highlight contexts and link it to the actual part of guide with the info?) when creating Tasks which is a feature you will only find with us. This allows you to sort your Tasks with certain identifiers.

Informant Sync also offers you the choice of making tasks or checklists. Checklists is an option that is only available in Informant.

## Feature comparison for event & task customization options

iCal	Google Calendar	Events within Informant Sync	Google Tasks	Apple Reminders	Tasks within Informant Sync
<ul style="list-style-type: none"> <li>• Title</li> <li>• Location or Video Call</li> <li>• All-Day Slider</li> <li>• Start time</li> <li>• End Time</li> <li>• Repeat Options</li> <li>• Travel Time</li> <li>• Choose Calendar to save to</li> <li>• Invitees</li> <li>• Alerts (Can set multiple)</li> <li>• Show As Busy or Free</li> <li>• Add Attachment</li> <li>• Add URL</li> <li>• Add notes</li> </ul>	<ul style="list-style-type: none"> <li>• Title (Option to add icons)</li> <li>• Option to change Event color</li> <li>• All Day Slider</li> <li>• Start and End Time</li> <li>• Location</li> <li>• Set Calendar to save to</li> <li>• Alarm (Can set multiple)</li> <li>• Repeat Options (Customizable)</li> <li>• Time Zone Options</li> </ul>	<ul style="list-style-type: none"> <li>• Title (Optional NLP Feature)</li> <li>• Location (Searchable via Apple Maps)</li> <li>• Start Time (Time Zone Option)</li> <li>• End Time (Time Zone Option)</li> <li>• All Day Slider</li> <li>• Busy, Free, Tentative, or Out of Office Status</li> <li>• Repeat Options</li> <li>• Alarms (Can Add Multiple)</li> <li>• Add Attendee</li> <li>• Tags</li> <li>• Choose Calendar to save to</li> <li>• Optional Icon</li> <li>• Choose color of Event</li> <li>• Sensitivity (Normal, Personal, Private, Confidential)</li> <li>• Comments</li> <li>• Add URL</li> <li>• Option to take photo for Event</li> <li>• Add Photo For Event</li> <li>• View Contact List</li> </ul>	<ul style="list-style-type: none"> <li>• Choose Date</li> <li>• Set Time</li> <li>• Repeat Option</li> <li>• Sort By My Order or Date</li> <li>• Create List</li> </ul>	<ul style="list-style-type: none"> <li>• Title</li> <li>• Notes</li> <li>• URL</li> <li>• Choose Date</li> <li>• Choose Time</li> <li>• Tags</li> <li>• Location</li> <li>• Reminder Notification when chatting with a person in Messages</li> <li>• Flag Task or not</li> <li>• Priority (None, Low, Medium, High)</li> </ul>	<ul style="list-style-type: none"> <li>• Title (Option to Star Task)</li> <li>• Location (searchable in Apple Maps)</li> <li>• Choose whether to save to a Project or no Project</li> <li>• Start Date</li> <li>• Due Date</li> <li>• Repeat options</li> <li>• Alarm (Can have multiple)</li> <li>• Contexts</li> <li>• Select Parent Task if needed</li> <li>• Action Handling</li> <li>• Priority (None, Top, High, Medium, Low)</li> <li>• Percentage complete slider</li> <li>• Tags</li> <li>• Icons</li> <li>• Choose Task Color</li> <li>• Select Task as Subtask</li> <li>• Enter subtasks if needed</li> <li>• Sensitivity (Normal, Personal, Private, Confidential)</li> <li>• Add Comments</li> <li>• Add URL</li> <li>• Take Photo for Task</li> <li>• Select Existing Photo for Task</li> <li>• Contact List</li> </ul>

## INTRO TO SYNC


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Now that you have the Informant Calendar installed on your device, let's set up your Informant Sync account. This will be the account you use to sync your calendar to all of your devices.


You can set up an Informant Sync account here:

<https://pocketinformant.com/products/informantsync/>

You can also set up your Informant Sync account within the application.

1. Tap on the 3 line settings icon  in the bottom right
2. Tap Accounts
3. Select Add Sync Service and choose Informant Sync
4. Choose the option to create a new account.
5. Create username and password, and complete your purchase or choose to continue with the two week trial option.

Once you have an Informant Sync account, it's time to log in on your device.

1. Tap on the 3 line settings icon  in the bottom right
2. Select **Accounts**
3. Tap on **Add Sync Service**
4. Choose to add an Informant Sync account
5. Log in using the credentials you created
6. Choose **"Start Sync"**


Adding your Informant Sync account will open up all of the features for Informant. This includes your Task View, Contacts, Notes, and the ability to Sync your account to multiple devices.

Now that you've added your Informant Sync account to your calendar, you can start syncing your devices. In order to sync devices together, you need to be logged into the same Informant Sync account on each device and complete a sync using the same steps listed above.

## ADDING SYNC ACCOUNTS

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Adding Additional Accounts

1. Tap the 3 line settings icon  in the bottom right
2. Select Accounts
3. Tap on Add Sync Service
4. Select the Account you'd like to add. Google Calendar, Google Tasks, or Toodledo.
5. Log in with your credentials for that account

## AVOIDING DUPLICATE DATA

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An issue with duplicate events is most typically due to a circle sync - meaning you have the same data synced to Informant from two different sources.

Edit both instances of a duplicate event in informant and go to the 'calendar' option. You'll see the name of the calendar it's assigned to here. Now tap that calendar name and you'll get a list of all calendars under the header of their sync service.

If you see that one events calendar is under the google header and the other events calendar is under the apple header then you have a circle sync to Informant from Apple and Google.

To fix this go to your device settings (not informant) and at accounts>gmail>turn off calendar.

Check to see if you have iOS calendars on. If you use both sync and iOS calendars with the same data, you will see duplicates. Pick one or the other.

## INTRO TO CALENDARS & EVENTS

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Adding events to your calendar is one of the features you will probably use the most within Informant. This feature will allow you to keep track of your upcoming appointments, vacations, meetings, etc.

### Adding Events to your Calendar

1. Tap on one of your Calendar Views
2. Tap the '+' icon at the bottom right of your calendar
3. Choose to add your Event or Task
4. The Event edit screen will open
5. Fill out your Event information
6. Tap save in the upper right corner

You can customize these events even further in your event edit screen.

### Adding Alarms

In your Event Edit Screen tap on the Green '+' icon to add an alarm. This will bring up your time scroll wheel. You can set multiple alarms to go off before and after your event.

### Repeating Events

You can also choose to repeat events for any events that will have multiple recurrences. There are daily, weekly, monthly, and yearly options. The custom selection will allow you to set specific days of the week, month, or year for your event to repeat on your calendar.

The event edit screen is also where you'll choose which calendar you'd like your event to save to. Tapping the calendar field will bring up your list of calendars under the headers of the sync service they are assigned to. This will be where you choose your Google, Apple, or Informant Sync calendars.

Events will automatically save with the color of the calendar they are assigned to but this can also be changed within the event edit screen.

## CALENDAR VIEWS

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### View Selector Calendar Views

**Focus View** will show a list of events and tasks (current and overdue) for the current calendar date.

**Month View** will show a scrollable calendar month with tasks and events showing up in each day block of the calendar.

**Agenda View** will have scrollable calendar days at the top of the screen with all events and tasks listed from earliest to latest.

**Days View** will show specific days with events and tasks listed out at each of their start times.

**Week View** will show a full week of events and task with each day in a side by side block listing times for each.

**Column Week view** will be similar to Day View but will have the full week in a side by side block.

**Year View** will show each month in a numbered calendar form with shaded colors to indicate that you have events or tasks listed on a particular day.

Each calendar view can be customized in different ways by going into your Informant Settings and tapping on View Settings and going into each calendar view.

You can also change the appearance of the calendars by going into your Informant Settings and tapping on **Color and Appearance**.

You can create filters for your calendars so that you can view only the data you choose.

To create a filter:

1. Select the calendar view you'd like to apply the filter to
2. Tap the circle with the 3 lines in the bottom left of the view selector



3. Choose your parameters
4. Tap Save this Filter

If you'd like to view all of your data in that calendar view, simply turn off the filter.

## CUSTOMIZING REPEAT EVENTS

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Informant gives you the option to set Events that repeat daily, weekly, monthly, etc...This way, you don't have to worry about recreating the Event each time you'd like to see it done.

To set a repeating task:

1. Tap your Calendar View
2. Select the '+' icon in the bottom right
3. Choose Event
4. Fill in your Event details
5. Select Repeat and choose your repeating option

You can choose to have an event repeat daily, weekly, bi-weekly, monthly, or yearly.


You can also use the "Custom" option for more in depth repeat options.

For example, Let's say you have a Family Reunion on the third Sunday of every year. You would create your event and select "Repeat". Then, you would select "Custom" and "Yearly". There will be a scroll wheel option to select the Third and another scroll wheel to select Sunday.

## ADDING SUBSCRIBED & EXTERNAL ICS CALENDARS

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Adding ICS or Subscribed calendars allows read-only access to hosted calendars which can contain items such as Sports Events, Moon Phases, or even Holidays.

1. Tap the 3 line menu option  in the bottom right
2. Select "Calendars, Triggers, and more"
3. Select "Manage Calendars"
4. Select the top-right "+"
5. Select "New Subscribed Calendar..."
6. Paste a url for a ICS calendar you already have or select public calendar search to find one.

## INTRO TO PROJECTS & TASKS

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One of the most helpful features of Informant is the ability to create projects that put all of your common tasks in one, easy-to-read space. With fully customizable options, you can add tags, contexts, colors, locations, and tons of other helpful information into each task associated with your projects.

Creating and customizing a project is easy. Simply tap on your task view (checkmark icon) on your view selector and select projects. Then you'll tap the '+' icon to create a new project. Give that project a name, choose where this project will sync, create a due date if needed, and choose how you'd like your project to be organized with next action types.

### Project Types

**Single Action** – The project will do any next action handling. This is for a project when the tasks are not related to each other. The project is made up of "one off" tasks.

**Parallel** – The project can have multiple tasks marked as next action working in "parallel".


**Sequential** – The project can have one next action task and when that task is completed another task in the project can be designated as the next action result in a "sequential" handling of the next actions.

## TAGS & CONTEXTS


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Tags can be a helpful tool for recognizing what kind of task or event you see at a quick glance. Tagging is useful for things you do often like Grocery Store trips or Finances.

### Creating Tags

1. Tap on the 3 line settings menu  in the bottom right
2. Select Calendars, Triggers, and more
3. Tap Manage Tags
4. Select the '+' Icon in the top right
5. Create Tag and choose color and icon for tag if wanted
6. Tap Save in the top right

### Deleting Tags

1. Tap on the 3 line settings menu  in the bottom right

2. Select Calendars, Triggers, and more
3. Tap Manage Tags
4. Select the tag you'd like to delete and tap the "trash can" icon in the bottom left.

Contexts can be applied to tasks in Informant. They serve multiple purposes. They can be used as an identifier and also as a way to group tasks together.

If you have added the context The Food Place to all of your tasks that involve The Food Place you can go into Informant, into the task view and tap the context grouping then select The Food Place context and see all the tasks, regardless of due date, project etc. that involve The Food Place and you can complete the tasks that you wish to at that time for that place.

### Creating a Context

1. Go into the Task View (checkmark icon)
2. Select Contexts
3. Tap the '+' on the bottom right

## CUSTOMIZING REPEAT TASKS

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Informant gives you the option to set tasks that repeat daily, weekly, monthly, etc...This way, you don't have to worry about recreating the task each time you'd like to see it done.

To set a repeating task:

1. Tap your Task View
2. Select the '+' icon in the bottom right
3. Choose Task
4. Fill in your task details
5. Select Repeat and choose your repeating option

You'll be given a few options to choose from. You can repeat your task from the Due Date, The Complete Date, or the Start Date. You can then choose how often you'd like the task to repeat.

The custom option allows you to set up a repeating task with a little extra detail if needed.


For instance, if you know that you have a Dungeons and Dragons game every 3rd Saturday of the month, you would follow the above steps and select "Custom" as your repeat option. Then you would Tap Monthly and use the scroll wheel to choose Third and Saturday.

## SMART FILTERS

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Smart filters are an easy way to sort your tasks by specific 'rules'.

Creating a Smart Filter:

1. Tap on the 3 line menu option  in the bottom right
2. Select Calendars, Triggers, and More
3. Tap on Manage Smart Filters
4. Select the '+' icon at the top right
5. Give the Smart Filter a title

Now that your Smart Filter has a name, let's give it some rules. Rules are what you want the filter to look for in your tasks so you see only tasks that apply to that.

The first option lets you choose from the following based on the type of task attributes you want to sort on:

- Action
- Completed Date
- Date Created
- Due Date
- Percent Complete
- Priority
- Folder/Project
- Starred
- Start Date
- Type
- Title

The second and third options will show you options for your comparison type and values based on the first option you chose.

For example, if you only want to see tasks that had a start date before today, you would set your first option to 'start date'. You would then set the second option to 'is before'. And you would set the third option to 'today'.

You can have as many rules set for each Smart Filter as you want. The more rules you have for one filter the more specific the results of that filter will be.

When all the rules you want to apply to that specific filter are set, save the filter.


Now let's see the results of the filter you set.

Once created, you have the options to view your Smart filters and their corresponding tasks in the Focus view as well as the general task view.

**Task view** - This view is found by selecting the checkmark icon at the bottom of your mobile device, or in the top nav bar on the Mac version. In this view you will see options such as Projects, Contexts, All Active tasks, Completed tasks, etc. Scroll down in this view to find your Smart Filters and select one to view its tasks that match the parameters that you have assigned to it.

**Focus view** - In order to view your Smart Filters in the Focus view you will need to adjust your Focus View settings first. In iOS go to Informant Settings > View Settings > Focus View > toggle on which filters you would like to add to the view. In Mac go to Informant menu > Preferences > Focus > check the boxes of the filters you would like to add to the view. Then when you are in the Focus View you will see all tasks that apply to those Smart Filters.

To delete a Smart Filter:

1. Tap on the 3 line menu option  in the bottom right
2. Select Calendars, Triggers, and More
3. Tap on Manage Smart Filters
4. Swipe from right to left on the filter you'd like to delete to bring up the red delete option

## LOCATION BASED FEATURES

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Informant offers a number of different ways to utilize the benefits of our advanced location features.

### Driving Directions:

One of the main basic features of location services is pulling up driving directions directly from the event you have saved in your calendar. Once you've created an event and added a location, you can tap the event and pull up the quick view window. From this window, you will tap on the location listed. This will bring up your Map. Tap the pin on the map, and then tap the car icon that appears in the left. This will bring up your driving directions.

### Location Based Tasks:

When you add a location to a task, you can set to be reminded when you enter or exit that location's region. If you tap on the map icon you'll be shown the region and you can then drag your finger to make the region larger or smaller.

To create a notification for a location in a task:

1. Create a new task or edit an existing one
2. Go to the location field and make sure that it says "Search or type a location" in the location field. If it does not, swipe to the left on the field to turn that on.

3. Type in a location and let the search show you possibilities. Since location alarms require a geo-location, we need to use the found results, not just plain text. Alternatively, you may use the location button on the right to search and pick location spots.
4. You can also use the location button on the right to specify region sizes.
5. You can now choose between alerts for arriving, leaving, or none.
6. Save the task.

Informant uses iOS' region notification features to provide notifications in a low-power method reliably. One major caveat to using location alerts is iOS only allows 20 at a time per app. This means that more than 20 will not alert. Also iOS will alert Informant - and therefore yourself - only after you've left or arrived within the region after a minimum of 20 seconds and within an indeterminate portion of the region to prevent spurious notifications.

### Focus View Map:

Another great location feature of Informant can be found in your Focus view. Any events that have been saved with locations attached will show on a map, with each location pinged on the map for a great overview of the day's events and locations. In your Focus view, simply tap the map icon in the View Selector.


### Location Based Contexts:

Location-based contexts for tasks is also another great way to stay organized and reminded to complete certain tasks when in the area. Using contexts to alert you when you are near a task location is easy! Read more on how to use this feature in the section of the User Guide on Tags on Contexts.

## TRAVEL ASSIST

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TravelAssist™ is a feature of Informant iOS and Android which automatically sets the time zones of events you enter in and out of the travel time. To work, it requires a travel plan with a specific timezone. The timezone is picked by the city you enter so it's easy to set up a trip:

1. Tap the 3 line menu button  the bottom right
2. Select Calendars, Triggers, and More
3. Tap on Travel Assist

To set up a trip:

tap on the + button or New

Pick your travel dates/times

Start typing a city name. As you type, Informant contacts a cloud service to search for cities out of a database of over 600,000 cities and offers the cities found in a popup menu underneath.

Pick the city that matches where you are traveling.

Press Done.

You'll now see that trip is set as an event in your calendar view.

When you create a new event after this for the time period you will be on that trip, it will automatically adjust the event time to the new time zone as you travel. That means that an event you create for 9:00am will still be 9:00am when you are in the new time zone.

*\*\*Please note, you must have an internet connection for TravelAssist™ to be set up, but you do not need it to work afterwards. The cloud service provides a way for Informant to search for a city and get that city's timezone. If you simply type the name of a city, TravelAssist™ will not accept the typed input because it needs a timezone to go along with it. If a popup with suggestions for the city does not appear there are two possible causes: Your entry is not found in the database; or you do not have internet access. Make sure you have internet access and choose a different city in the same time zone as you will be in\*\**


## EMAIL TO TASK

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Email to task is a feature within Informant that allows you to quickly turn your emails into tasks that save to your calendar.

Before you can start using Email to Task, you'll need to generate a private email address that is specific to your sync account. All emails sent to this address (regardless of the source) will be converted into a task for you.

To generate your private email:

1. Tap the 3 line menu option  in the bottom right
2. Tap Accounts and choose the Informant Sync account
3. Choose Sync Options and scroll to the bottom of the screen
4. Tap "Task Email Not Configured" and it will generate an email address for your sync account. You will see the email address listed here.

Now just send emails to the email address you get.

The subject line of the email becomes the Task title, and the message body becomes the Task note. You can even set certain parameters of the task by using a special syntax. The syntax is used within the title of the email.

- Priority - The default priority is "Normal". Use the ! character to indicate how important the task is.
- Due Date - To set a due date use the # symbol and then type "yesterday", "today", or "tomorrow"

- Start Date - To set the start date use the > symbol and then "yesterday", "today", or "tomorrow". For example: ">today".
- Star - To star a task use the \* symbol by itself. For example: "My Task \*".
- Project - To set the project use the \* symbol and then type the name of your folder. For example: "\*Housecleaning".
- Context - To set the context use the @ symbol and then type the name of your context. If your context is actually named "@HomeStuff" then you would need to type "@@HomeStuff" to set the context, since the first @ is the symbol and the second @ is part of your context.
- 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: "%Family,Cleaning".
- Note - The body of the email will become the note of the task. You can prevent email signatures or other parts of the email from becoming part of the note by typing -end- where you want the note to end.

Each new piece must be separated by a space followed by the special character. As an example, the following subject line would create a Task called "Clean garage" starting today, due Mar 20, medium priority, with Family and Cleaning Tags, in the Housecleaning folder, and HomeStuff context:

Clean garage >today #3/20 !! %Family,Cleaning \*Housecleaning @HomeStuff

## SEARCH

---

Informant has a built-in Search Menu to search, by title, for data that is saved in your Calendar.

On your View Selector you will see your filter select (circle with 3 lines) on the left, and your '+' icon on the right. There is a little horizontal line in between them. If you swipe up on that line, it will bring up your search bar. (This is also a way to use quick sync on your Calendar by pressing the Sync option in the top right.)

Here, you can type in the name of an event, task, or note and bring up that particular item. **By default, the search timeframe will be set to +/- 1 year.** You can change this setting by tapping on the cog wheel located on the right side of the search bar. The Date Range will be located at the bottom of this screen.

Your choices here are:

- Past 15 Years
- The Next 5 Years
- +/- 1 year
- +/- 5 Years



This is also where you can turn on all of the content you'd like to have included in your search.

There is also a search function for your Informant Settings. If you tap the 3 line menu button in the bottom right corner of your screen, you'll be in the settings menu.


Swipe down on this screen to bring up the search bar. Here, you can type in keywords you are looking for in your settings.

## TRIGGERS

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Triggers are an easy way to create events or tasks using set keywords. This makes creating events and tasks that you do on a regular basis easy to set up and apply to your calendar.

To create a Trigger:

1. Tap the 3 line menu button  in the bottom right
2. Select Calendars, Triggers, and More
3. Tap Manage Triggers

You will give your Trigger a title and add in your keywords. (Make sure to separate each keyword with a comma.) Now, when you want to create an event or task pertaining to this particular trigger, you will just start typing one of your keywords into the title field. This will create an event or task using the details you've added to your trigger.


Currently, Triggers do not sync between devices and will have to be created on each device individually.

## NOTES

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Informant has a built-in Notes feature that allows you to create and save notes into your Calendars and Projects.

Upon opening Informant for the first time, Notes View will not be visible on your View Selector. To enable Notes View:

1. Tap the 3 line menu option  in the bottom right
2. Select View Settings
3. Tap on Enable Views

Selecting notes here will allow you to add the Notes View to your View Selector.

You can also select **Notes View** here and set a **Default Sync Account** for your notes to save to.

Choosing a Calendar listed under the Informant Sync heading will ensure that all of your notes are synced to your account.

Tap the '+' icon on your calendar and select Note to create a new note. Alternatively, you can tap on the **Notes View** on your View Selector and press the '+' icon in the bottom right here.

In your notes edit screen you can tap the 'i' icon in the top right to select a notebook (connected with a task project) to add a note to, add a tag to a note, and choose an icon if wanted.

You can also tap the square with the up arrow in the middle to send your note to someone, to an email, or to another application on your device.

You can see notes assigned to projects, tags, starred, all, and today's notes as well.

Within those groups you can also apply a filter in order to only view notes that have specific tags assigned to them. To apply a filter, select the filter icon in the lower left of the view.

## CONTACTS


---

While you are able to see your contacts in Informant, it doesn't maintain a contacts database or sync contacts.

All of your contacts must be shown in that same device in the native contacts app that Apple provides. Then those will automatically be available in Informant once permissions are granted access.

When you tap the contacts icon in informant, you'll see a page that says 'all contacts'. Tap that line and all of your contacts will appear.

When first signing into Informant, Contacts view will not be visible on the View Selector. In order to show Contacts as a selection on the View Selector:

1. Tap the 3 line menu option  in the bottom right
2. Select View Settings
3. Tap on Enable Views

Adding Attendees to an event that is being saved to an Informant Sync calendar will be as easy as selecting "Attendees" in your Event Edit screen. As long as that contact has a valid email address saved into that contact's information, you'll be able to add this contact as an attendee and send an emailed notification.

iOS does not give us access to modify attendees - either adding, editing, or deleting them - from an iOS event. So for iOS events, you won't be able to edit until Apple allows us to. This will be the case for any event that is being edited from an Apple Calendar.

In the meantime you can set the settings in Informant to create events using the iOS editor instead of Informant's own editor.

When you do that you are given Apple's iOS Event Editor instead of ours, and because it is Apple's editor, it is allowed to modify/edit/add attendees.

To change this setting go to the Informant settings, sync accounts, options, and turn off both sliders for the Informant Editor. This will change Informant to use the iOS editor and the invitee field will be visible.


## CUSTOMIZING VIEW OPTIONS

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### View Selector Options

Upon a fresh install, your view selector will have your Calendar Views and Task Views shown by default.

To show things like Contacts or Notes you will have to enable these views.

1. Tap on the 3 line menu option  in the bottom right
2. Select View Settings
3. Tap Enable Views
4. Turn on any View Option you'd like to see on your View Selector
  - Focus View
  - Tasks
  - Notes
  - Contacts

## WIDGETS

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Informant 5 offers 3 types of widgets for seeing your events and tasks at a glance on your homescreen.

To add the Informant Widget to your homescreen

1. Hard press on an empty space on your homescreen
2. Tap the '+' icon in the top left
3. Scroll to Informant 5
4. Choose the widget style best suited to your needs

The Small Widget will show your selected data in a 2x2 space.

The Medium Widget will show your selected data in a 2x4 space.

The Large Widget will show your selected data in a 4x4 space.

To edit the data that appears in your Widget, press and hold on your selected Widget and choose Edit Widget.

This is where you can choose to show the weather in the widget, all tasks, all events, or a mix of both.


The Widget will show the data from your Focus View, including any set filters.

## DARK MODE & OTHER THEMES

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Informant offers a variety of background color modes and themes.

To change your background color mode:

1. Tap the 3 line menu option  in the bottom right
2. Select Color and Appearance
3. Tap on Theme

Here your choices are:


- Night Mode
- Light Mode
- Gray
- Automatic (This theme will default to the theme set on your device)

## WEATHER

---

Informant offers an option to show the weather for each day in your Calendars.

To add the weather to your Calendars:

1. Tap on the 3 line settings option  in the bottom right
2. Select View Settings
3. Tap on Weather

Your options here are:

- Weather Location (Automatic by default but you can also put in a zip code or search phrase)

- Refresh Weather
- C/F (Set to Automatic to region by default)

You can also choose which calendar views you'd want to see the weather on:

- Focus View
- Agenda View
- Week View
- Month View
- Week/Month Detail View
- Event Detail

If you are unable to see the weather in your selected views:

Go to Informant Settings>Accounts>Informant Sync>Make sure you are logged into your Informant Sync account and have a recent last sync date and a current expiration date. You must have an active Informant Sync subscription to have the weather feature.

In your device settings (not Informant), confirm you have allowed informant access to location services.

Go to Informant Settings>View Settings>Weather>choose a location instead of allowing automatic to make sure weather is able to get a good location on your device. Then turn on weather in the areas you want to see it in using the sliders at the bottom of that page.


*If you still have trouble, go to [www.darksky.com](http://www.darksky.com) and enter your location there to make sure our weather provider is able to access that area as well.*

## BACKUPS

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Informant 5 offers automatic backups of your Informant Sync & settings data.

To set your automatic backup time:

1. Tap the 3 line Settings menu  in the bottom right
2. Select Backup/Restore
3. Tap Automatic Backup

Informant will automatically create a backup of your database on the interval set, but you can create a backup at any time. To create a manual backup at any time, simply go into your Informant Settings>Backup/Restore and choose to "backup now".


It will automatically be saved to your device or you can choose to email the backup to yourself or to your iCloud.

## Restoring a Backup:

*\*\*Before restoring a backup file there are some important things you need to know:*

*First when you restore the backup all of the current data in Informant will be overwritten with the backup data.*

*Second, if you have experienced a total data loss and your data has not been restored after you have performed a restore from a backup file, that is an indication that your Informant was configured to use the iOS calendar data. This is not backed up in Informant. If this happens to you, please contact support.\*\**

1. Tap on the 3 line settings menu  in the bottom right
2. Select Backup/Restore
3. Select the backup file you'd like to restore, then select from the restore options

*\*\*Please note that you cannot restore an Android backup to an iOS device or vice versa\*\**

If you are syncing your data and choose to restore from a backup file rather than repopulate Informant from the sync service, you could cause your data to be duplicated.

Syncing after restoring the data from a backup file will duplicate all like items that exist between Informant and the sync service that you are using. We advise, when possible, to recover your data from the sync service.

If this is not possible and you are concerned about duplicating your data please contact support.

Informant will save your backups locally and to iCloud.

To view the local device files, go to the Files app > On My iPhone/iPad > Informant 5 > AutomaticBackups. To view the iCloud versions, go to iCloud Drive > Informant 5, and this will show backups for all of your Apple devices. Eg, AutomaticBackups\_iPad, AutomaticBackups\_Carl's iPhone, etc.

To view older backups that have been deleted, you can find these files on iCloud.com via an iPad or web browser. Log in using your Apple ID and go to Settings > Restore Files. This will show any backups and other files that have been deleted in the last 30 days.


Note - Color Day customizations are not included in the backups and do not sync across devices.

## FACE ID & PASSCODES

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Informant 5 gives you the option to use a passcode and Face ID within the application. In order to use Face ID you will need to set up a passcode.

To Set up a Passcode:

1. Tap on the 3 line menu option  in the bottom right
2. Select General
3. Tap Set Passcode

You can follow these steps to clear a passcode that has been set as well.

Once you have a passcode set, if you'd like to use Face ID you'll follow the above steps 1-3 and turn on the slider for Use Face ID to Access Informant.

If you forget your passcode, you will need to uninstall Informant and reinstall. There is no way to retrieve a passcode that has been set.

## APPLE WATCH APP


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Informant's Apple Watch app offers a quick view of events, as well as tasks that are either starred, overdue, or due.

To set up Informant on your Apple Watch:

1. Open the Watch App
2. Scroll down to Available Apps
3. Click the Install button next to Informant 5

To reset the data displaying on the Apple Watch:

1. Tap the 3 line settings menu  in the bottom right
2. Go to Advanced and click on Reset Apple Watch

## APPLICATION BADGE

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Informant offers an application badge that will show an indicator icon on the home screen Informant app icon. You can set this badge to show information based on what you'd like to be updated on by looking at your Informant application icon.

To turn on the Application Badge:

1. Tap the 3 line settings menu  in the bottom right
2. Select General Settings
3. Tap Application Badge

Here you can choose for the Application Badge to show:

Tasks Overdue  
Tasks Due Today  
Tasks Overdue and Due Today  
Starred Tasks  
Task Next Actions  
All Tasks  
Events Remaining Today  
Filtered Events Remaining Today  
Today's Date  
Events Remaining + Overdue and Due Tasks

## NATURAL LANGUAGE PARSING

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### Natural Language Parsing

Natural Language Parsing (NLP) is the autofill option you can choose to use when typing in Events. If you type things like Coffee at 6AM on Friday at Donut Shop, Informant changes the Event title to Coffee, and the time and date to 6AM on Friday and adds the location at the Donut Shop to help create the details of your event quickly.

You can enable or disable this feature by swiping Left on the Title field in the Event Edit screen.

When NLP is enabled you will see "Title (or event description)". If it's disabled, you will just see the word "Title".

## PRINTING

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You can print your calendar or task view in Informant. Anything that is shown on your calendar view you are on when you choose to print (including tasks and pinned notes) will be printed. Any task that is shown in the task view you are on when you choose to print will be printed.

From your calendar view, tap the menu bars at the bottom right and choose the print option. Choose the date range that you want to print and tap the Save option at the top right.

You will then be taken to the print plugin on your device to see a preview and choose which printer you want to use or save to PDF.


Printing will be done in an Agenda style. There is not a way to change that at this time.

## EXPORTING CALENDARS

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Informant Sync calendars are the only calendars that can be exported from within the Pocket Informant app. Exporting a Google calendar to iCal or an iCal calendar to Google is not possible within Informant.

To export a calendar:

1. Tap on the 3 line menu button  in the bottom right
2. Select Calendars, Triggers, and More
3. Tap Manage Calendars

From here you will tap the calendar you'd like to export and tap the "Send" icon in the lower left. Choose to send this file to your email. This will send your events to your email in the form of an .ics file. Save this file to your computer.


To import your file into Google, open up your Google Calendar online. Select the cog icon in the top right and go into your Settings. Select Import or Export. Choose import and select your ics file. This will import your event into your chosen Google Calendar.

To import your file into iCal, open up your Apple Calendar on your Mac. Select File at the top of the screen and then select Import. Tap the ics file and select the calendar you'd like to add the information to.

## CHANGING ALARM SOUNDS

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You can change the Alarm Notification sound easily in Informant. To do so:

1. Tap the 3 line menu button  in the bottom right
2. Select View Settings
3. Tap Calendar Settings


Here, you can choose the Alarm Notification Sound for alarms you set in Informant.

## DATABASE STATISTICS

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You can view the amount of information you have stored in your Informant app by checking Database Statistics.

To see your Database Statistics:

1. Tap the 3 line menu option  in the bottom right
2. Select Advanced
3. Tap Database Statistics

When performing a database statistic request for Informant Sync, please note that all statistics are capped at 15,000. This means you can have over 15,000 events, tasks, etc...synced up to Informant Sync but the Database Statistics will only show 15,000 instances.

## BETA TESTING

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Our application is always being updated and new features and fixes are being added on a regular basis. In order to test the stability of these updates and fixes, we release a Beta version for our customers to use and report back any issues they might find. (This Beta version is only made available after our internal testing phase.)

In order to install the Beta versions that are released for public testing, you will need to first go into the App Store and download Testflight. This app will have the Beta versions available for download and testing.

After downloading Testflight, you will use the link below to install our public beta:

<https://testflight.apple.com/join/h1WB27ar>

## FAQS AND SUPPORT

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Our FAQ page has helpful information, instructions, and screenshots on using our features. To reach the FAQ page you can use this link:

<https://faq.pocketinformant.com/>

Our Support chat is also available Monday through Friday from 8:00am to 4:00pm Eastern Standard Time. This can be reached directly from your application or using the link below:


<https://webis.helpshift.com/hc/en/3-pocket-informant/contact-us/>

To contact Support through the App:

1. Tap the 3 line menu option  in the bottom right
2. Select Support
3. Choose Help/tips for help with common issues
4. Tap Talk to Support to send a message to our Support Team

In your case description please give as much detail as possible. It is also helpful to know exactly what you were doing in the app at the time of the issue. The more data you can provide at the beginning of the case the less we will need to go back and forth to get questions answered.

To enable logging for support cases:

1. Tap the 3 line menu option  in the bottom right
2. Select Advanced
3. Select Application logging and choose the option that applies to the concern you are having.

**\*\*Someone from Support will direct you on when to send in the logging\*\***

## SHARING DATA

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There are a few ways to share your data.

First Informant 5 requires a subscription to informant sync to access the connection bundle. It is the subscription to the connection bundle that allows Informant 5 to sync to any of the services.

It is possible to share a single subscription. As part of any Informant 5 subscription you can use the Informant Sync service. If you haven't already please go to the following link and create your Informant Sync account. <https://pocketinformantonline.appspot.com/signup>

Then add that sync account in the Informant Sync settings for each Informant 5 application that you wish to unlock and tap begin sync, the application will remain unlocked as long as the sync subscription is current. It doesn't matter if you have different iTunes accounts, just that you login to Informant Sync with the same username on both devices.

Then it's your choice how you want to share your calendars as all of the following options will be available:

Google calendar - You can sync with google and share your calendars. You would either login to the same google account on both devices, or login to your own google account and within your google calendar online choose to share a calendar with them. The data will then be available in Informant through your google calendar sync in informant and your google calendar online.

Apple calendar - if you have the same apple ID your calendars will all be available in informant automatically. If you have different apple ID's you would need to share a calendar from within your apple calendar app on each device with each other. That data would then be available in informant automatically through your apple calendar sync in informant and your apple calendar app.

Informant sync - If you choose to share a subscription - since you would be already logged into the same account on both devices, you are already sharing your calendar assigned to this account. You can create as many calendars as you want that are synced and if you choose, stop the sync to specific calendars the other doesn't need access to. You can start/stop syncing to these calendars easily by going to informant settings>accounts>informant sync>calendars to use.

## FEEDBACK

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We welcome all customer feedback, if you have an idea for new or improved feature:

Please enter your suggestions using our interactive feature request system. You can rank its importance and other users can vote and comment on it. It also will give Engineering the ability to follow up with you if they have any questions. Many of the current Informant features were born right here.

<http://feedback.pocketinformant.com/>

Thank you for helping us to make Informant better.

## SOCIAL MEDIA

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