

# Gaining Your Effective EDGE

with Your BlackBerry  
and Microsoft Outlook

BlackBerry Best Practices



Whitepaper

Provided by



# Gaining Your BlackBerry EDGE

BlackBerry Best Practices with Outlook from Effective Edge

The BlackBerry is one of the most effective tools in the marketplace. For some of us, we want the 'tool' to do the thinking for us. We frequently forget who is the 'master' and who serves the master, and we let the tool take over our lives. You can regain control over what some have come to refer to as their 'Crackberry' by making a few adjustments.

There are numerous models of the BlackBerry, and new ones are coming on the market regularly. (Some steps may be different on the BlackBerry Storm or other touch screen models.)

Follow these simple steps to setup your BlackBerry for optimal use:

1. From the main screen, select PROFILES, then ADVANCED. This feature allows you to determine which options you enable at what time. For example, in a meeting, we recommend you select QUIET so that you have 100% of your energy, attention and focus on the content of the meeting. We recommend that the PHONE ONLY setting be used most frequently so that you are only notified for phone messages.
2. You have the ability to determine how you are notified based on each of the BlackBerry applications. We recommend the following:

<b>Area</b>	<b>In Holster</b>	<b>Out of Holster</b>
Browser	None	None
Calendar	Tone and Vibrate	Tone and Vibrate
Level 1 Message	Tone and Vibrate	Tone and Vibrate
Message	None	None
SMS	Tone	Tone
Tasks	Tone and Vibrate	Tone and Vibrate

3. Turn off the e-mail count indicator:
  - Open the e-mail application.
  - Click the Menu button and choose Options.
  - Select General Options.
  - Choose Display Messge Count and change the option to None.
  - Click the Menu button and choose Save.

#### 4. Synchronize the BlackBerry Device with your Outlook mailbox:

Set it up so that when you delete an email from your BlackBerry device it deletes it from your Outlook Mailbox simultaneously and vice versa.

- On your BlackBerry device, from the Menu screen:
  - Select Mailbox
  - Click Menu button
  - Click Options
  - Click Email Reconciliation
  - Make sure that delete on: says Mailbox & Handheld
  - Wireless Reconcile: is ON
  - On conflicts: mailbox wins
- If you are not set up through Exchange server but through the Blackberry Web client, then you can set up synchronizing as follows:
  - On the BlackBerry Manager (on your desktop), Select INTELLISYNC. In SYNCHRONIZE NOW, Select the box for Reconcile Messages, Synchronize PIM and Update date and time.
  - Then under CONFIGURE RECONCILIATION. Select the box, 'synchronize moves and deletes' and 'mailbox wins.'
  - Under Personal Folder, select PROJECTS (the folder you set up in the GTE Training).

#### **Blackberry Shortcut Keys**

To view the Blackberry device keypad layout, view this page on the web: <<http://supportcingular.atgnow.com/cng/knowledgebase/KB53227.html>>.

#### **General Tips**

- Hold the Alt Key while you roll the pearl or wheel to scroll horizontally in any field where you can enter or view text.

### **BlackBerry Curve**





## BlackBerry Users Website/Blog

BlackBerry users can keep in touch with each other and read blogs and numerous articles about BlackBerry use on this site:

[blackberryunderground.com](http://blackberryunderground.com)

Check it out!

### General Tips (continued)

- While holding the Alt Key, tap the Return Button and use the thumb-wheel to maneuver through recently used applications.
- Hold the Alt Key while you roll the pearl or wheel to scroll through a field to view options.
- Hold the Cap Key while you roll the pearl or wheel to select multiple items in a list.
- When in the Menu or Options list, type the first letter of an item in an options list or menu to jump directly to that item.
- Type the first letters of a name or the initials separated by a space to find a contact in the Address Book.
- While in the Message screen, press C to compose a new message from the home screen or within Messages.
- To rearrange the Home screen, hold the Alt Key and click the thumb-wheel to bring up a menu. You can then select Move Icon, Hide Icon, or Show All. If you hide an icon, to show it again click Show all and it will appear with an X over it, bring up the menu on it and uncheck hide icon.

### In the Message List

#### Sorting

- Alt Key+i: Show only incoming mail
- Alt Key+o: Show only outgoing mail (messages you have sent)
- Alt Key+p: Show phone log messages
- Alt Key+s: Show SMS messages
- Alt Key+v: Show Voicemail messages

#### Navigating

- t: Go to top of message listing
- b: Go to end/bottom of message listing
- Return: Close message listing and return to home screen (ribbon)
- Spacebar: Page down
- Cap Key+Spacebar: Page up

## Deleting multiple messages at once

- Highlight a date (i.e. Fri, Feb 06, 2009) in the message list, you may have to select Full Menu, then depress the pearl or wheel and select Delete Prior. All messages prior to that date will be deleted. (deleting messages in this format will NOT reconcile with desktop or Web Client, use with caution)
- Hold down the Cap Key and use the pearl or wheel to scroll up or down to select messages. Click the pearl or wheel and select "Delete Messages". Combine this with a sorting tip to make it even more useful (i.e. To delete the last 5 messages that you have sent (checkmarks), press Alt Key+o (for outgoing) to show all of your sent messages, then scroll down and select the last five.

## While In A Message

### Navigating

- Enter or Spacebar: scroll down a page/screen at a time Alt Key+Enter or Spacebar: scroll back a page/screen at a time
- b: Scroll to end of page
- t: Scroll to top of page
- u: Jump to closest unread message
- n: Jump to next message
- p: Jump to previous message
- Backspace: Close message and return to message listing

### Reply-to/Forward

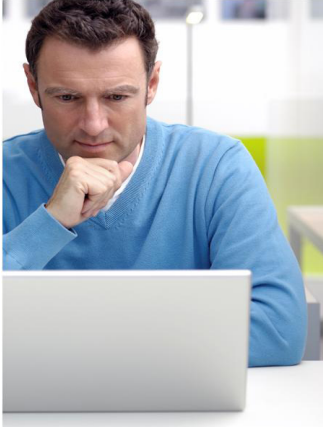
- r: Reply to or answer this message
- f: Forward this message

## Select Text

- Cap Key+Scroll pearl or wheel will select character-by-character. If you release the Cap Key and scroll the thumb-wheel you will select entire lines. Press the Cap Key again at any time to start selecting by character again.
- Alt Key+Click pearl or wheel will select whole lines. You can press and hold the Alt Key at anytime to start selecting by character again.

## BlackBerry Bold





## Stay in the Know

EDGE for Professionals alumni get ongoing support from Effective Edge. Log on to our online learning center to access whitepapers, on-demand courses and more!

[www.effectiveedge.com/  
alumni](http://www.effectiveedge.com/alumni)

### Composing A Message

- Press and hold a letter to capitalize it.
- Press the Spacebar twice to insert a period and capitalize the next letter.
- Press the Spacebar to insert the "@" and "." characters in an Email field. Backspace and type again to over-ride this like you would with AutoText.
- Press and hold a letter key and roll the pearl/thumb-wheel to scroll through international/accent characters, equation symbols and other marks.

### Working in Your Applications While on a Call

You can remain on a phone call and access your applications at the same time by following these steps:

- Press the pearl or wheel and activate the speaker or headset
- Click on the Back button
- You will see a question, "Do you want to continue the call and exit to the home screen?"
- Answer "Yes"
- Scroll down and click on the desired application.

### Using your BlackBerry with your EDGE System

Note: Some of the following steps may not be appropriate for the BlackBerry Storm model.

Now that you've got the basics of BlackBerry management down, let's look at how to integrate the EDGE System with your BlackBerry. Your BlackBerry can do almost everything you need to do to keep your EDGE System up-to-date and functioning well.

### 4 D's for Processing Email

Using your BlackBerry, you can accomplish three of the four D's for processing your email: Delete it, Do it, and Delegate it. To accomplish the 4th D, Defer it, you'll have to be at your computer. Here's more details on how to perform the D's using your email on the BlackBerry.

## Delete It

If you have your BlackBerry set up so it is in sync with your Outlook, when you delete or move your email in one tool, the same action happens automatically in the other. For example: deleting an email or moving an email to a folder in your BlackBerry will also be accomplished in your Outlook.

- To delete an email message:
  - highlight or open the email
  - select delete

If there is no action, but you want to file the email:

- If you have project folders (best practice is to keep your Project folders on the server, rather than on a local drive) you can file everything that needs filing from the Inbox.
- To file an email:
  - Open the email
  - Click the Menu button
  - Select the "file" option to display your folders as they are in your Outlook
  - Select the desired folder

## Do It

You can take action by replying to an email or forwarding the email to someone else for action.

- To reply to an email:
  - Press R to reply
  - Type your message and send
- To forward an email:
  - Press F to forward the message
  - Type a message and send That is how I can take action.

## Delegate It

You can delegate an action to someone by replying or forwarding the email. Follow the same steps as in Do It (above).

## BlackBerry 8700



## BlackBerry Pearl Flip



When you are back at your desktop, drag the sent message to your task bar and label it "Waiting For."

### Defer It

Since you are probably unable to do more complex tasks like review a detailed spread sheet, or read a long document quickly, you will need to defer those tasks.

It's not a perfect world, however you are able to handle a little more than

80% of the messages that you receive by doing the first 3 D's, from your handheld.

Create appointments or tasks as place holders:

- Highlight important content of the e-mail.
- Click the menu button and choose Copy.
- Click the menu button and choose Switch Application.
- Choose the Calendar or Task. (if they aren't available, choose the Home Screen and then the application.)
- Create a new item, click the menu button and choose Paste.
- Save your changes and switch back to your e-mail.

Delete e-mail or insert the e-mail into the appointment or task when you get back to your Outlook.

### Accessing Your Task List

You may often find yourself in situations when you've processed your email, and find yourself away from your computer and have some time to get some things done. You can access your Task list from your BlackBerry. For example, you're at the airport, waiting to board, and you have time to make some calls. You can quickly access your Calls category from your BlackBerry.

### Viewing a Category in the Task List

This function allows you to lift out of your Tasks exactly what you want to do now.



To access your category:

- Open the Task application (may be on Home screen or under Applications.)
- Click the Menu button
- Select "Filter" to see your Categories
- Scroll down to the Category you want to view
- Click on the Category and list will be displayed

### **Outlook Today**

During EDGE for Professionals, you set up Outlook Today to show you a snapshot of your day. Unfortunately, the BlackBerry does not have this feature, but you can still accomplish the same type of morning review by changing a few settings on your BlackBerry Calendar.

Turn on Tasks in the Calendar:

- Open the Calendar
- Click the Menu button
- Choose Options
- Change Show Tasks to Yes

Agenda View in the Calendar:

- Open the Calendar.
- Click the Menu button.
- Choose View Agenda.
- Tasks will appear at the top of the day (at midnight); appointments will appear in their appropriate time slot.

With these settings, you will be able to review all of the things you need to do today.

Your BlackBerry can be a very useful extension of your EDGE System. It allows you access to many of the components of EDGE. You'll be able to keep your productivity as high as possible, using your time most effectively, even while you're out of the office, or your computer is not readily available. Enjoy your increased productivity using your BlackBerry with the EDGE System!