

Gaining Your Effective EDGE

with iPad & Microsoft Outlook

iPad Best Practices



Whitepaper

Provided by



Gaining Your iPad EDGE

iPhone Best Practices from Effective Edge

iPad Website

For general information on how to use the iPad effectively, refer to the iPad support page on the Apple iPad website:

www.apple.com/ipad/

When we use something as feature-rich as an iPad, we sometimes allow the tool to do the thinking for us, and we let it take over our lives. This white paper focuses on how to best use the iPad with your EDGE system. You can regain control over your iPad by making a few adjustments:

Turn off the e-mail notifications:

1. On the Home Screen tap Settings, then choose General on the left hand menu and tap Sounds.
2. Under New Mail, tap Off. This is equivalent to turning off the e-mail notification pop up in your e-mail. Now, you won't be distracted with each new e-mail that arrives in your in box. You have control over when you look at and process the e-mail.
3. Set the sent mail option to off. This will prevent sent messages from being held in your iPhone, which could slow it down.

You can also change how you are notified by the different productivity applications of iPad. We recommend that while in a meeting, turn the volume and the vibrate function off so that you have 100% of your energy, attention and focus on the content of the meeting. After the meeting, reset your volume and vibrate functions.

To turn the volume and vibrate function off:

1. From the Settings screen, select Sounds.
2. Select Silent Option.
3. Vibrate = Off.

The good news is that setting up the iPad for use with Outlook through Microsoft exchange is as simple as knowing a few taps and settings.

The bad news is that, while the information synchronization process is simple and effortless, the only applications in Outlook that synchronize with the iPad are the Calendar, Contacts and E-mail In Box.

We evaluated numerous productivity applications for synchronizing Tasks and Notes with Outlook. At this writing, we currently recommend **iMExchange2**, the same application that is recommended for use on the iPhone.

iMExchange2

iMExchange2 is a user friendly application that is easy to install. With iMExchange2, you have access to both Outlook Tasks and Notes. When you add a Task or a Note on your device and sync, you can see the new entry pop up in Outlook very quickly.

iMExchange2 looks and performs like a built-in iPad task application and connects directly to your Exchange server with no additional software required. It syncs wirelessly with MS Exchange and allows offline access to Tasks and Notes. iMExchange2 is usually compatible with standard installations of Exchange 2003 and 2007 with Outlook Web Access enabled.

IMPORTANT NOTE: Full functionality is free for a trial period only. Purchase the continual sync upgrade to re-enable the save/add buttons and continue two-way syncing indefinitely.

With iMExchange2 you never need to be without your vital Outlook notes, tasks or out-of-office status again.

iMExchange2 incorporates the most useful Outlook Task features allowing you to:

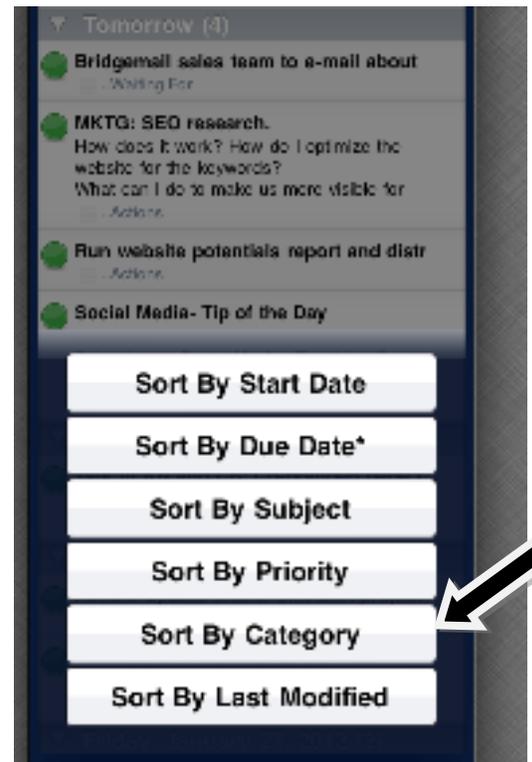
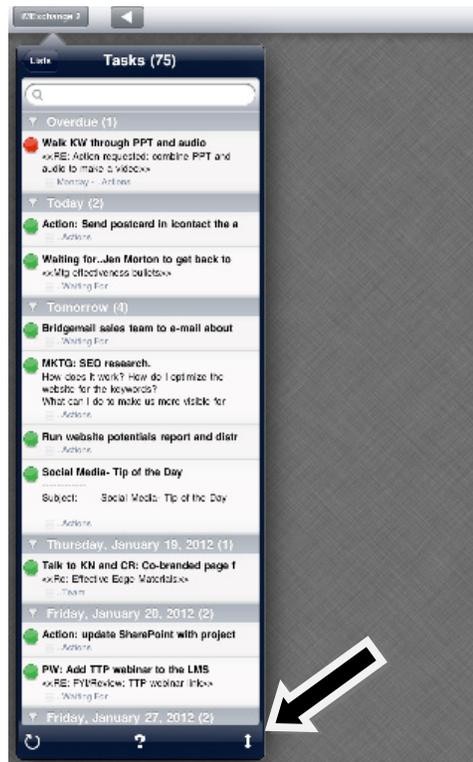
- Use the same EDGE Categories you created in Outlook Tasks.
- Create, modify, complete and delete tasks.
- Hide or display completed tasks.
- View only tasks that are currently due or view all of your tasks.
- The notes view gives you access to your Outlook notes in real time.
- Set your out-of-office status and message remotely.

- Test full functionality before you pay for the upgrade.
- Completely new architecture to support the iPhone and the iPad in the same app.
- Upgrades are tied to your iTunes account.
- Task reminder support.
- Local notification alerts for reminders due.
- Calendar view when setting dates.

Once you have completed your first sync, setup is easy.

To sort Tasks in iMExchange2 by Category:

1. Tap the Double Arrow  on the ribbon at bottom of the screen on the left-hand side.
2. Tap Sort By Category.
3. Tap Items to return to the Tasks view.

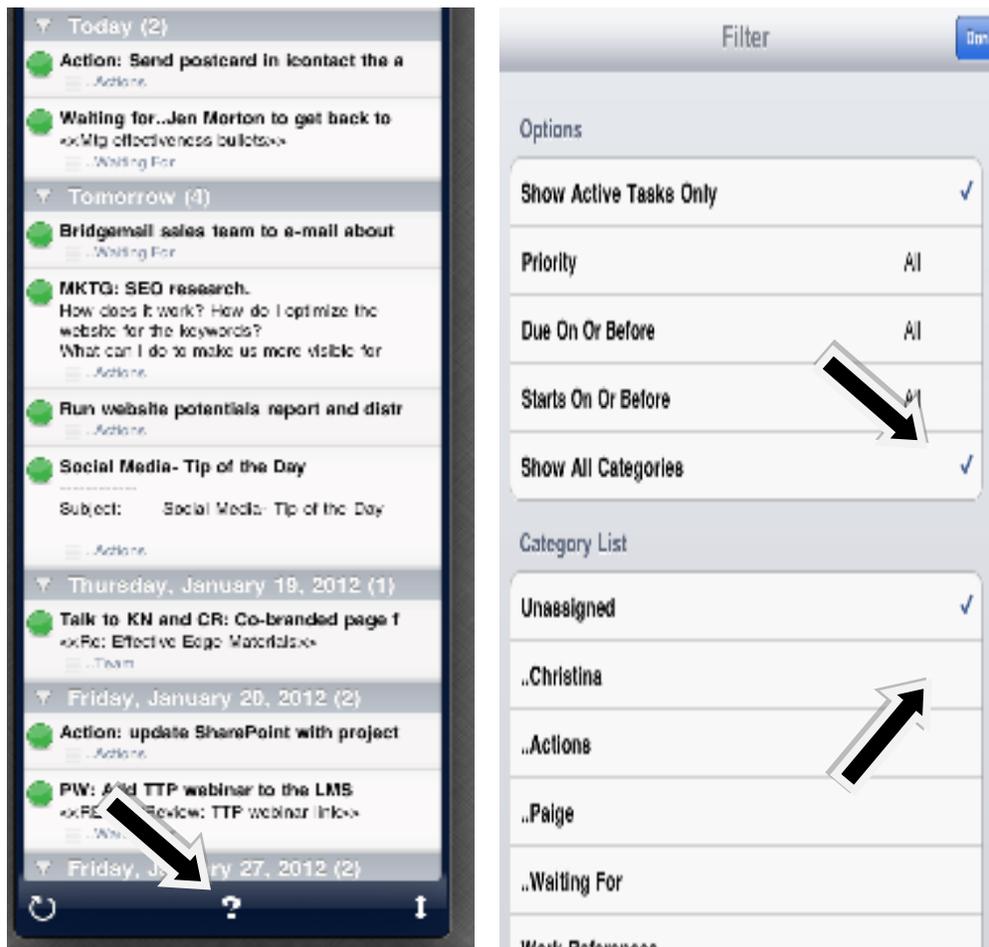


As you may remember from your *EDGE for Professionals* class, the best practice for viewing Categories in the Task List is to keep your categories collapsed, so that you work only in the categories you want to work in, .e.g.: You would only open and look at your Team category when you were talking

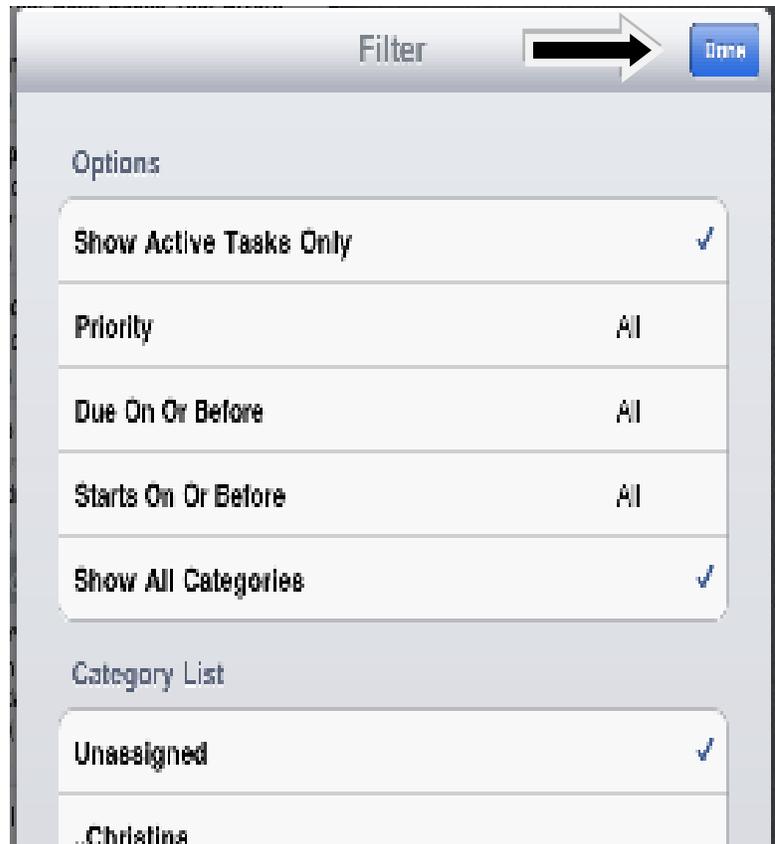
with a Team member. You would look only at your Projects category when you were accessing a document in the Project, or creating a new action item that you have to Defer after completing the previous action on the task list or calendar, etc.

To see specific categories in IMExchange2 do the following:

1. Tap the ? on the ribbon at the bottom of the screen.
2. Tap Show All Categories to uncheck it.



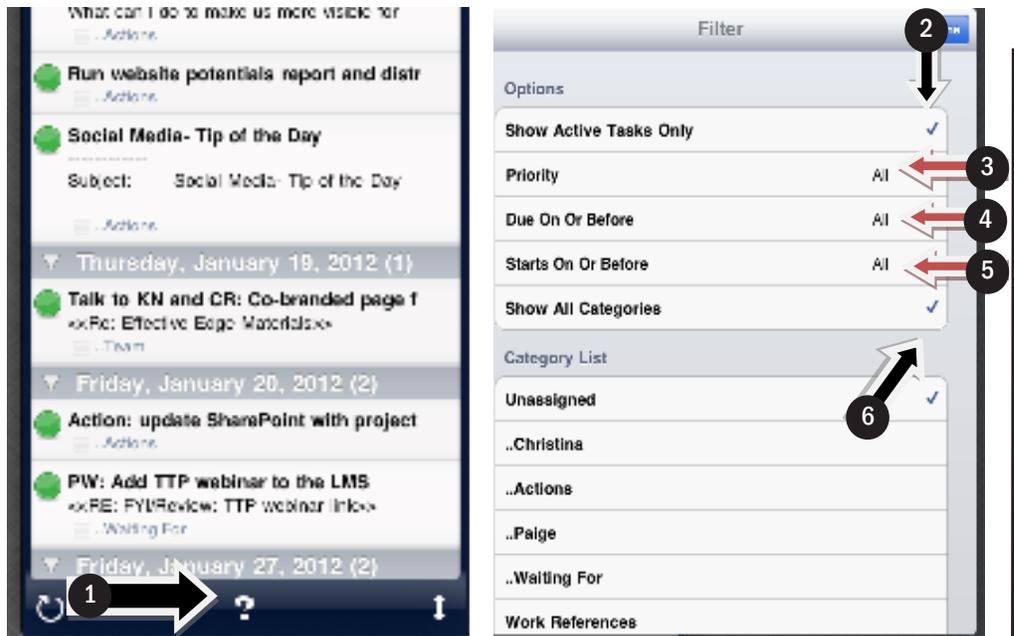
3. Tap the category/categories you want see and a check mark will appear.
4. Tap Done.



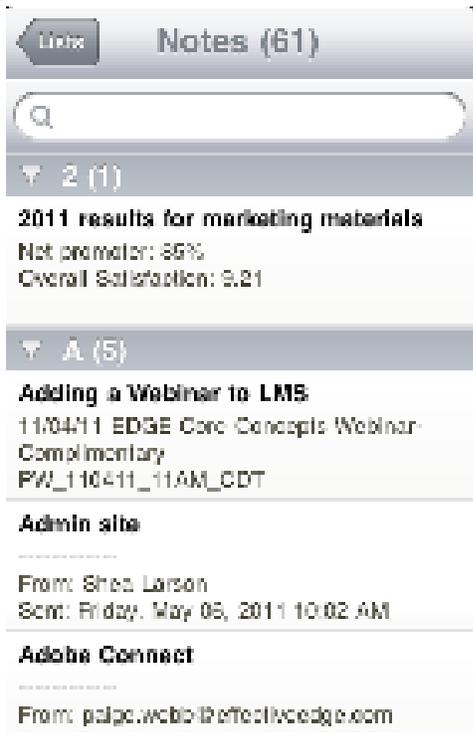
To make sure the filter is set correctly for the EDGE process:

1. Tap the ? button at the bottom of the screen.
2. Make sure Show Active Tasks Only is checked.
3. Priority = All.
4. Due on of before = All.
5. Starts on or before = All.
6. Tap Show all Categories to check it.
7. Tap Done.

(See figures on the next page.)



iMExchange2 Notes is an iPad touch note application designed specifically to synchronize with Microsoft Outlook. iMExchange2 Notes gives you access to your Outlook notes in real-time.



Your Notes are displayed in alphabetical order by subject.

Using your iPad with your EDGE System

Let's look at how to integrate the EDGE System with your iPad.

Your iPad can do almost everything you need to do to keep your EDGE System up-to-date and functioning well.

4 D's for Processing E-mail

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

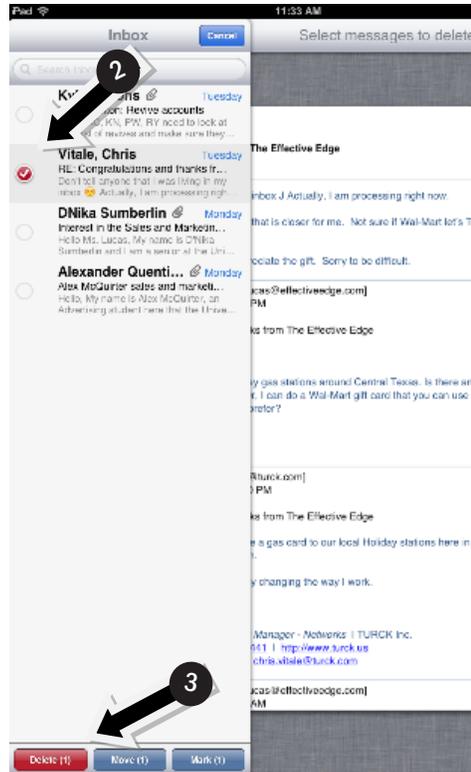
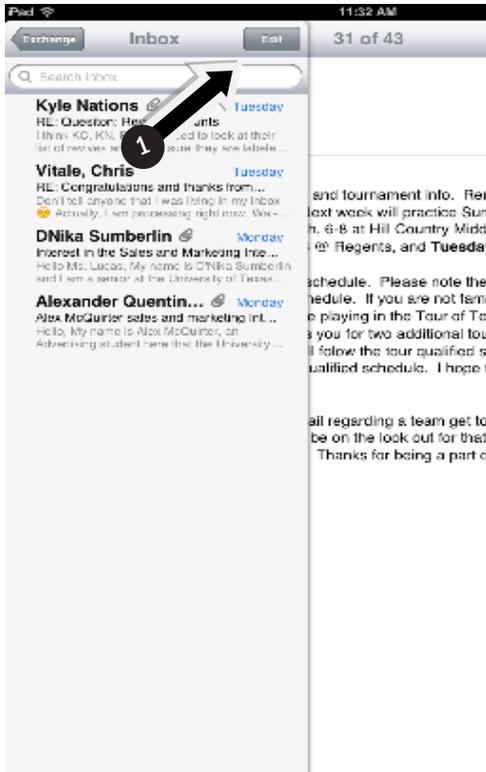
Delete It

If your iPad is setup to synchronize with MS Outlook, then everything that happens in one tool will happen automatically in the other. For example: deleting an e-mail or moving an e-mail to a folder in your iPad will also be accomplished in your Outlook.

There are two ways to delete messages on the iPad:

From the inbox list:

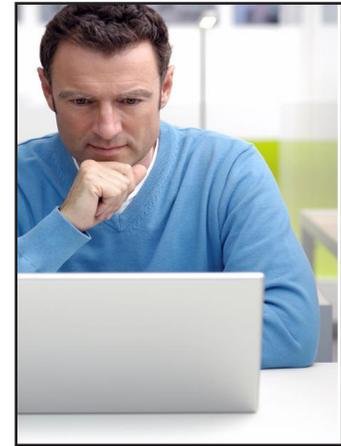
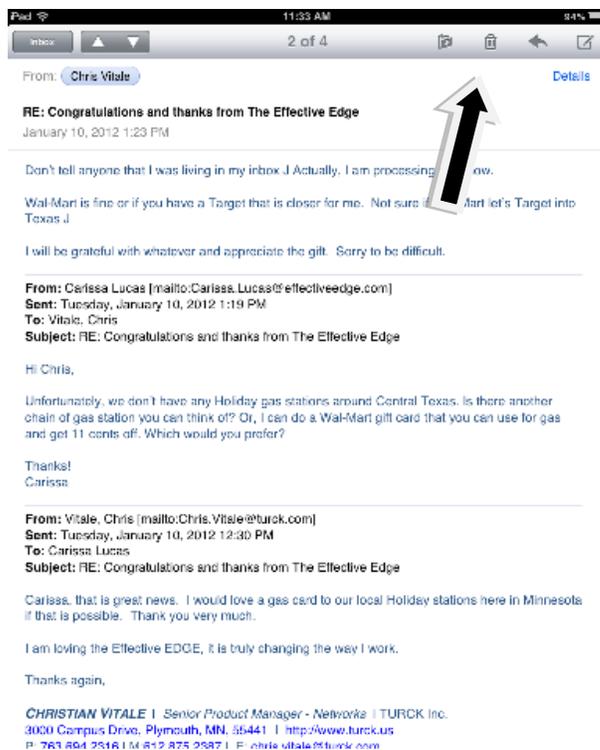
1. Tap the edit button in the upper right corner of the inbox and it will change the view to the same list of e-mail, but each e-mail will have a button to the left of it.
2. Tap the button and a check mark will appear. Select the e-mail that you do not need.
3. Tap the red Delete button in the lower left hand corner of the screen. (See figures on next page.)



You can also delete the message when you are reading the e-mail.

1. Open the e-mail and read it.
2. Tap the trash can at the top right of the screen.

(See figure below.)



Stay in the Know

EDGE for Professionals

Alumni get ongoing, practical, useful and inspiring reminders to continue enhancing their productivity by reading our monthly eNewsletter or following us on Facebook and Twitter.

Alumni can sign up to receive our newsletter by visiting www.effectiveedge.com/blog, and clicking the SUBSCRIBE tab on the right, then selecting "Subscribe to the RSS Feed," or "Subscribe to the e-mail feed."

Visit our Web site to find out more about our social media presence.

If there is no action, but you want to file the e-mail as Project reference or General Reference, you can:

- Simply leave everything that needs to be filed in your Inbox. Then, when you return to your office, you can move them to the correct folders.

OR

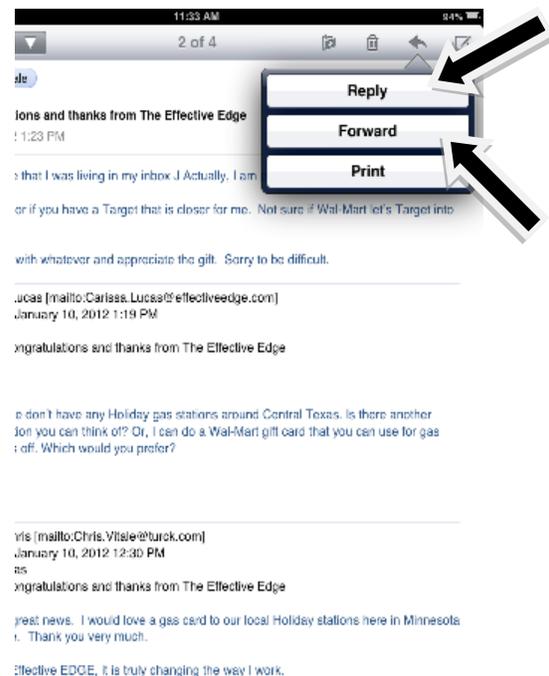
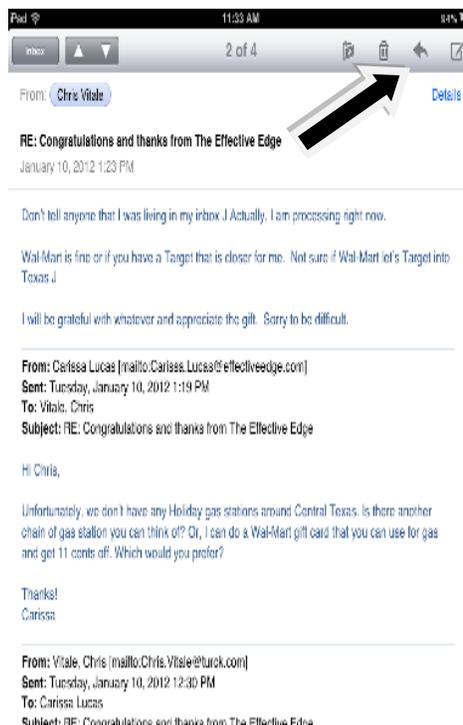
- Move your project-related e-mail to the Projects folder you created on the server. (As you remember from EDGE for Professionals, the best practice for storing non-actionable e-mail is to keep them in a Projects file on the server rather than on a local drive. Also, keep in mind if you have limits on how much you can store on the server, when you put e-mail with large attachments on the server, they will take up space and could cause you to go over the mailbox limit set by IT.)

Do It

You can take action by replying to an e-mail.

To reply to an e-mail:

1. Open the E-mail.
2. Tap the Arrow on the right at the top of the screen.
3. Choose the Reply button from the new screen.
4. Type your message and send.



Delegate It

You can delegate an action to someone by replying or forwarding the e-mail.

To forward an e-mail:

1. Open the E-mail.
2. Tap the Arrow on the right at the bottom of the screen.
3. Choose the Forward button from the new screen.
4. Type your message and send.
5. If you no longer need the e-mail, delete it from your inbox.
6. If you need the e-mail or any attachments, leave it in your inbox until you return to your desktop.

When you return to your desktop, go to your sent items. Drag the sent message to your Task List and categorize it as "Waiting For." Then, go to your inbox and view the original message. File the e-mail, or save any attachments and delete the original message.

Defer It

You may not want to do more complex tasks like review a detailed spread sheet, or read a long document on your iPad. Instead, you may want to defer those tasks until you return to your office. If your iPad and Outlook are synchronized, then the only e-mail left in your in box when you return to your computer will be those you need to defer to your Calendar or Task list.

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, leaving the remaining defer items to be dragged to your Calendar or Task list when you return to your computer.

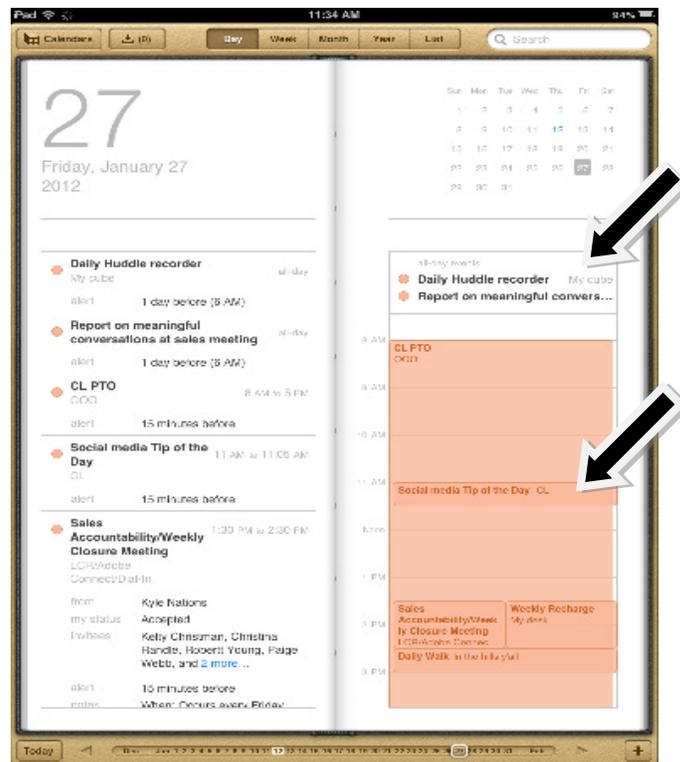
Outlook Today

During *EDGE for Professionals*, you set up Outlook Today to show you a snapshot of your day each morning. Unfortunately, the iPad does not have this feature. However, you can accomplish the

same type of morning review by using your Calendar and Today's tasks on the iPad.

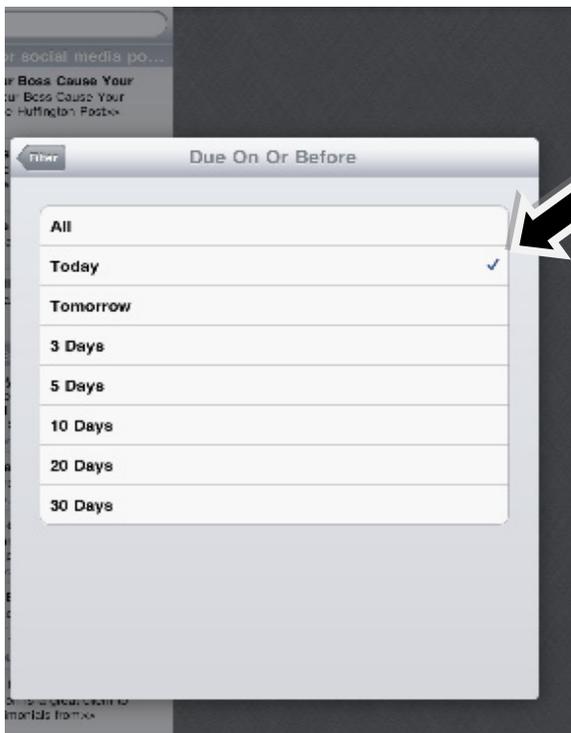
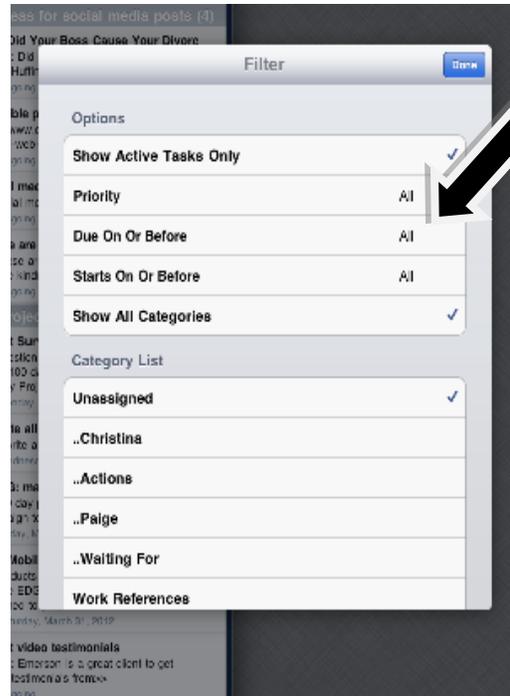
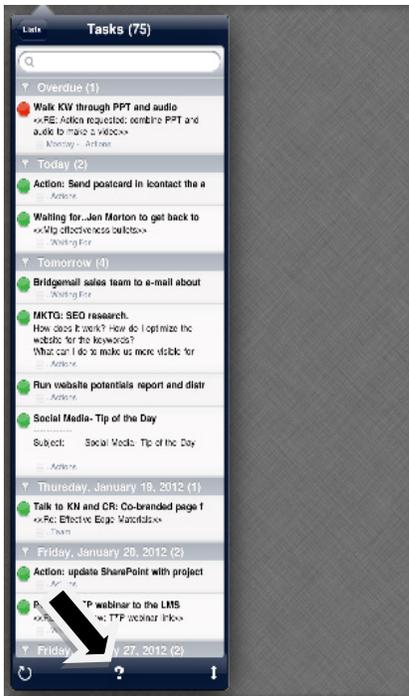
To see your calendar events for today, just open your Calendar to Today.

1. You will see your Day Specific Events at the top of the Calendar as all day events.
2. Scroll down the times of the day to see all of your time-specific appointments. The all day events will remain at the top just like in Outlook. (See figure below.)



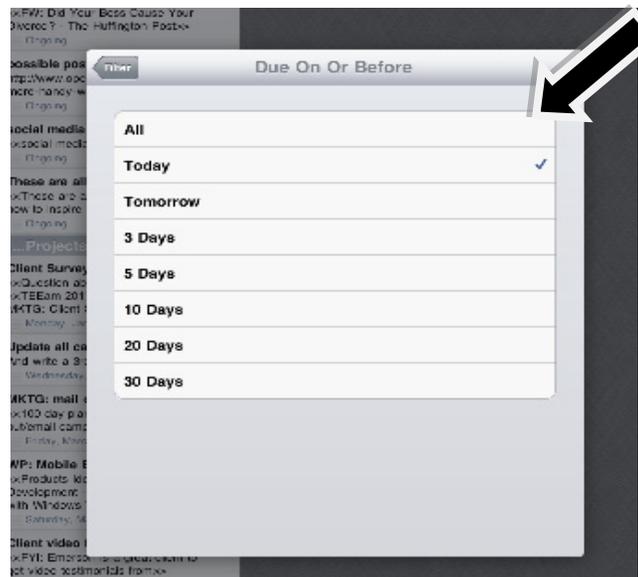
To check your Tasks that are due today, in iMExchange2:

1. Open iMExchange2.
2. Tap the **?** at the bottom of the screen.
3. Tap **Due on or Before.**
4. Select and Tap **Today** and then Tap **Done.** (See the following figures on the next page.)



To return to the **All** view in IMExchange2 Tasks:

1. Tap the **?** at the bottom of the screen.
2. Tap **Due on or Before.**
3. Then select and Tap **All** and then Tap **Done** twice. (See the figures on the next page.)



Even without your Outlook Today screen, you are able to review all of the things you need to do today with your iPad.

Your iPhone 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 at times when your computer is not readily available. Enjoy your increased productivity using your iPad with the EDGE System!