



# Gaining Your Effective EDGE

*with Windows Phone® & Microsoft Outlook®*

## Windows Phone Best Practices

In today's fast-paced world, companies are looking for ways to aid in their employee's ability to work on the go. As a result many companies, large and small, are issuing handheld mobile devices to their workforce. However, it takes more than a phone with shiny buttons to keep your information moving forward. This is why a host of companies install Windows Mobile technology.

Windows Mobile is a familiar product and easy to use. It helps individuals (and companies) improve performance by giving the user mobile versions of core desktop applications, such as MS Office including MS Outlook. It allows the user to send and receive email, manage tasks, access notes, develop Word, Excel and PowerPoint documents while away from the office. The software is designed to connect and integrate your mobile device with your company's Exchange Server, giving you the benefit of working on the go while accessing and synchronizing your work to the office desktop. In addition you are able to delete items, and sync between your handheld to your desktop.

No matter the brand of handheld device you use, the following simple tips will help you better process your information and effectively manage your day with Windows Mobile.

#### **Synchronize your handheld device to your Outlook Mailbox**

Synchronize your handheld device to your Outlook mailbox so that actions you take while using your handheld device are also carried out in your Outlook Mailbox. Synchronizing will prevent the need to take action in both places:

- From your Main Menu screen select MAILBOX
- Select MENU
- Select OPTIONS
- Select E-MAIL RECONCILIATION

- Select the DELETE ON option for Mailbox & Handheld
- Turn on the WIRELESS RECONCILE option

### Turn Off Email Notifications

To turn off new email notifications, follow these steps:

1. From your Main Menu screen, select SETTINGS.
2. On the Personal Tab, select SOUNDS AND NOTIFICATIONS.
3. On the Notifications tab, from the drop-down menu select, INBOX NEW EMAIL MESSAGE.
4. Uncheck the following:
  - Play Sound
  - Display message on screen
  - Vibrate when ringer off
  - Vibrate when ringer off
5. Click OK and Close SETTINGS.

### Setting Up Your Email

When setting up your email account on your handheld, always consult your IT Department and for additional assistance we recommend reviewing the Windows Mobile email set up Help Page at <http://www.microsoft.com>

### Six Fundamental Actions in Windows Mobile:

The following are actions that you can take in your handheld device as part of your EDGE System. The steps are very similar to how you perform these actions in Outlook.

### 1. Creating a new APPOINTMENT OR MEETING

- From your Main Menu screen select CALENDAR
- Select NEW APPOINTMENT
- To make the appointment an ALL DAY EVENT, select ALL DAY EVENT under END TIME

### 2. Creating a new TASK

- From your Main Menu screen select TASK
- Select Menu
- Select NEW TASK
- In the SUBJECT box, enter the task to be completed
- In the DUE DATE box, enter your deadline date
- In the CATEGORIES box, choose the appropriate category

### 3. Marking a TASK complete

- From your Main Menu screen select TASK
- Select Menu
- Select the Completed Task
- Select COMPLETE



#### Alumni Support

EDGE for Professionals alumni have access to practical, useful and inspiring support through our Alumni Support web page.

Alumni can also sign up for our free, one hour, info-packed EDGE refresher webinars. Reclaim your time, eliminate stress and boost your energy.

To learn more about our support materials and webinars, visit:

<http://effectiveedge.com>

#### 4. Viewing a TASK by CATEGORY

This view is useful when you are trying to find specific tasks. Look in the category to find a list of similar tasks, instead of searching through your entire list of tasks.

- From your Main Menu screen select TASK
- Select FILTER
- Choose the desired Category

#### 5. Creating a NOTE

- From your Main Menu select NOTES
- Select NEW

#### 6. Creating an EMAIL

- From your Main Menu select INBOX
- Select NEW

You will see all of your tasks in due date order. Make sure your Options are set to display Due Dates.

### **Using your WINDOWS MOBILE with the EDGE System**

Now what you've got the basics of Windows Mobile, let's take a look at how to integrate the EDGE System with your Windows Mobile. Windows Mobile can do almost anything you need to do to keep your EDGE System up-to-date and functioning well.

#### **The 4 D's for Processing E-mail**

Processing your email using the 4D's and your Windows Mobile is easy as one, two, three! Although, you will not be able to DEFER items from your email INBOX to your CALENDAR or TASK pad from your handheld, you will be able to complete the options to DELETE IT, DO IT & DELEGATE IT.

#### **DELETE IT**

Because your handheld is synchronized with your Outlook, when you delete or move an email on your handheld or desktop, the action will automatically be processed on both systems.

DELETE an e-mail:

- Highlight or open the email
- Select DELETE

If the email does not require action but you need to keep it as a reference, you can file the email from your handheld using the following steps:

- Open the email
- Select MENU
- Select FILE to display your folders as they appear in your Outlook mailbox (You will only see the folders you have stored under your mailbox in the Exchange Server.)
- Select the desired folder

#### **DO IT**

If you are in a position to complete the action requested in the email from your handheld, DO IT!

How to reply to an email:

- Open the e-mail
- Select Reply

If you need to REPLY ALL or FORWARD:

- Select Reply MENU
- Select REPLY ALL or FORWARD

#### **DELEGATE IT**

You can delegate an action by opening a new email, replying to an existing email or forwarding an email from your Inbox.

Note: When you are back at your desk, drag the sent (Delegated email) to your task pad and categorize it 'Waiting For.'

#### **DEFER IT**

Because you will not be able to move email from your Inbox to your

Calendar or Task Pad from your handheld, you will need to keep them in your Inbox until you return to your computer.

If you use the 4D's throughout the day, you will be able to process 80% of your messages, leaving only Defer It items in your Inbox needing to be dragged to your Calendar or Task Pad.

## Outlook Today

As a part of the Executing Section of the EDGE for Professionals class, you set up your Outlook Today view. Windows Mobile offers a very similar view.

To set up the Today View:

1. Press Menu in the bottom right corner
2. Select Preferences
3. Select Today Settings
4. Choose the fields you wish to view in your Today View:

We recommend the following:

- Date
- Inbox
- Messaging
- Calendar
- Tasks

The Today View will display the fields you have checked. You will be able to see the beginning of your daily calendar in this view. To see the entire calendar for the day, while in the Today View, press the calendar icon on the left side of the screen.

Begin your day  
deliberately by reviewing  
your Calendar and Tasks  
at the start of each day

To view the number of Tasks due today:

- Select Menu
- Select Preferences
- Select Today Settings
- Highlight Task
- Select the Options button
- Check mark Tasks due Today and Overdue Tasks
- Uncheck High Priority option
- Choose OK twice to save the changes and exit the Today Settings.

With these settings, you will be able to review all of the things you need to do today. Your Windows Mobile can be a very useful extension of your EDGE System.

It allows you to access many of the components of EDGE.

You'll be able to keep your productivity high and use your time effectively, even while you're away from your computer. Enjoy your increased productivity using Windows Mobile with your EDGE System!

More Information at

<http://effectiveedge.com>

