

CHAPTER FOUR

Setting up an Explorer's iPhone

Introduction

You've chosen an iPhone for your Explorer and you've got a cellular plan. Now it's time to get real. It's time do the initial setup of your Explorer's device.

You don't need to get everything done at once and you don't need to get it all right. You'll have lots of chances to come back and tweak the initial setup. So sit down with your favorite beverage and this chapter and get to work. I'll keep this one short, in future chapters I'll go into more detail on restrictions in particular.

iPhone setup - Start here

If you haven't used an iPhone before, or you're a less technically inclined Guide, consider scheduling an initial setup of an Explorer's iPhone at the Apple Store. Among other things they can update a phone to the most current iOS version it works with.

Otherwise it's a good idea to skim the "Setup and get started" section of the Apple User Guide mentioned in the introduction. The address <https://help.apple.com/iphone> will display the most current version of the User Guide. Don't just follow the setup guide though, read this chapter first!

Apple does a pretty good job with their iPhone User Guide but there are two key ideas they may not cover. The first key idea is that you want to have the iOS version of the iPhone match the iOS version of the User Guide. For a new or recent iPhone this may require an iOS update. In this case you'll do the initial phone setup, including entering iCloud and App Store credentials, then follow the instructions for doing an iOS update (see the User Guide if you haven't done this). Then return to the setup process.

If you have an older iPhone that can't be upgraded to the latest operating system you need to find an older user guide. For several years it's been possible to get to older versions by putting the version number in the address, like: <http://>

help.apple.com/iphone/9/. You can also access older iOS version manuals from <https://support.apple.com/manuals/iphone>. Again, do the initial setup and upgrade as needed to the most recent version of iOS that's compatible with your Explorer's iPhone.

The other key idea that Apple may not describe well is that there are two ways that an iPhone can be managed. One is using Apple's iTunes on a Mac or Windows machine with a cable connection¹ to the iPhone. Apple doesn't encourage this older option.

The other way to do app and media installation and backups is through Apple's iCloud service. Apple wants customers to use iCloud and I agree — it's much easier to use than the old method and backup is more automated (see iPhone backup and restore for some important limitations though). So when you read the User Guide you can ignore the discussions of iTunes.

At this point you're almost ready to begin setting up your Explorer's iPhone. You just need to know how what initial passwords your Explorer will need, and which they have to know.

iPhone setup - About unlock and iCloud/iTunes Store passwords

Every iPhone user has to know **a password to unlock their iPhone** and they need to have **an email address and password for their iCloud account** (phone backup, messaging, calendaring) and for iTunes Store purchases (buying media, books, and apps). I recommend thinking about these before you start the phone setup process described in the iPhone User Guide. Write down the email address and passwords you will use. There are some important Explorer specific considerations with the iCloud email address and password I'll describe below. The combination of user name and password are known as user "credentials".

During setup you will be asked to assign an unlock code/password for the Explorer's phone. I recommend working with your Explorer to choose this. The unlock code doesn't have to be a high security code, it does need to be easy to remember and easy to type. A relatives name with an added may suffice. It's probably a good idea to recommend an Explorer not share their unlock code. Newer iPhones are most often unlocked by a fingerprint touch, but Explorers will need to enter this code periodically.

During setup you will also be asked to create an Explorer's iCloud credentials or, if they already have an account, to enter their existing credentials. If an Explorer doesn't have an iCloud account you will want to choose their iCloud email address (user name) and password in advance.

When choosing an email address you want to consider how vulnerable the Explorer is and where this address will be used. You may decide that an Explorer's email address should not use their full name or should not suggest gender. In

general a Guide and Explorer will want to choose an email address that is easy to type and remember and will be appropriate on a bank form or job application.

The iCloud password is tied to Explorer information, location tracking, finding and managing a lost phone, phone security, and purchasing media and apps. It needs to be treated like a bank account password; it needs to be impossible to guess and should never be reused anywhere else. This is true for every user, but there's a unique consideration for the Explorer. *Explorers do not necessarily need to know their iCloud password*, for many Explorers I recommend only the Guide know and manage the Explorer's iCloud password.

For example, every day large numbers of neurotypical net users are tricked into revealing their secret passwords. If an Explorer does not know their high security passwords they cannot be tricked into revealing them. As Explorers develop more skills and independence they may take on management of critical passwords, but in many cases fingerprint or other "biometric" authentication measures will work in place of a password.

I discuss password security and management in detail in the next chapter, Digital identity and managing passwords, but I'll review some key points here. The iCloud password should be at least 12 character and ideally at least 15 characters. It should be relatively easy to enter by tapping an onscreen keyboard. There are many ways to create a secure password, my personal preference is to combine randomly chosen pronounceable words with a few numbers and "special characters" like &^%#. Sites like www.rempe.us/diceware will provide random word suggestions (note they recommend passwords so long that it's hard for me to tap them in, mine are a bit shorter).

Once you have an Explorer's phone unlock code and iCloud/iTunes Store credentials established and saved in a secure place you're ready to start the setup process.

During the setup process you'll be asked to enable **two factor authentication** for the iCloud account. At the time I write it is possible to proceed without this increased security step but Apple is pushing to require it. I think Apple will soon make two factor authentication mandatory. That's too bad because I personally dislike the way Apple does its two factor authentication, I much prefer using a strong iCloud password that an Explorer does not know. A user can't be tricked into revealing their iCloud password if they don't know it.

I recommend *not* implementing two factor authentication for an Explorer's phone despite Apple's dire warnings. If you must enable it however I recommend enabling at least two backup phone numbers — the Guides and at least one other number belonging to a trusted third party.

In addition to entering passwords you'll be asked if you want to enable Touch ID. I recommend deferring this to later. I'll first discuss how the iTunes Store works for Explorers, then I'll review Touch ID setup.

iPhone setup - Store accounts, Family Sharing, and Touch ID

Apple has provided many ways for customers to purchase digital products, including customers that don't have credit cards or even bank accounts. That's good for Explorers, but it can be confusing. It doesn't help that Apple has multiple kinds of "store" and they currently use the term "Apple Store" for where they sell physical goods online and offline. (Rumor is they're going to rename everything. They need to.) For the purposes of our discussion I'm going to use the term *iPhone Store* for the digital things we buy from Apple for an iPhone through an Apple ID. This includes Apps, Movies & Video, Music, Books & Audiobooks, "Apple Music" streaming and probably more. Sometimes Apple calls this all "Content". Even though these things are sold through different apps and ways they all share one payment method (Apple Stores are completely separate for now).

During iPhone setup you will be asked to setup a iPhone Store account that can be used to purchase media (music, video, etc) and apps. Apple's directions vary over time, but they usually imply you need to provide a credit or debit card during setup. This may be an issue for Explorers who do not have a credit/debit card or who may use it unwisely. In reality, at the time I write this, you can complete the setup without providing a credit/debit number. You may need to read the screens carefully to complete setup without entering a credit/debit number.

There are several aspects of Store account setup to consider for an Explorer, particularly if they receive Supplemental Security Income (SSI) or Medicaid services. For example, the purchase of apps and media by an Explorer's credit card *may* have advantages over use of a debit card²

Because a credit card is technically a loan from the credit card company to the cardholder, the goods or services purchased by a trust beneficiary using a card are not income and do not affect his access to government benefits. If the special needs trust then pays off the balance of a beneficiary's credit card bill, the payment is likewise not considered income. Because of this special treatment, an SSI or Medicaid beneficiary who is capable of managing her own affairs can use a credit card to make small purchases, and a trustee of a special needs trust need not micromanage every transaction.

Yes, this is a complicated area. You don't want to try to figure this out all at once! You can change how the Store accounts after the initial setup. I'll list a few options below in rough order of my personal recommendation, the first two are particularly good choices for many Explorers.

Don't enter any credit card and "gift" media and apps. This is the simplest and

most controlled way to put apps and some media on an Explorer's iPhone — though at the time of writing it doesn't work for songs (yeah, that's weird) or for in app purchases.

Depending on Restrictions Restrictions (below) an Explorer will be able to acquire free apps and media but will be unable to buy anything. They will get apps and other content by receiving gifts.

A Guide (or other person) will gift Apps or media from their device (iPhone, iPad, computer running iTunes, etc). They will visit the iPhone Store, find the desired item, tap the "Share" icon³ and enter the Apple ID for the Explorer. The Explorer then gets an email on their iPhone and taps a button to accept the item. A Guide may need to do this last step on the Explorer's iPhone, at least for initial transactions.

This can be a good initial choice for many Guides and Explorers but it has several limits. In particular it doesn't support in-app purchases. The next method has fewer limits.

Don't enter any credit card during iPhone setup and buy iPhone Store credit for the Explorer. Depending on Restrictions (below) an Explorer will be able to acquire free apps and media but will be unable to buy anything until Apple iPhone Store credit is added to their Apple ID account⁴. iPhone Store credit is added by purchasing credit. Apple's web site lists several ways to add iPhone Store credit⁵ including buying a plastic "iTunes Store" card using cash at retail outlets, electronically "gifting" credit from a different iPhone Store account, or using the "iTunes Pass" by visiting a physical Apple Store with cash.

Depending on how Explorer Apple ID credit is added an Explorer may need to take steps to add the credit to their account. In practice a Guide may have to purchase the credit and then, using the Explorer's iPhone, add the credit too the Explorer's account. The Guide may then need to complete a purchase, though most Explorers will learn to make their own purchases.

This method is more complex than the gift method describe above and it gives less control over Explorer actions, but it also promotes more Explorer independence and skill development. It works for anything a customer would buy on an iPhone Store. If an Explorer receives social security disability this might or might not be treated as a physical gift.

Don't enter any credit card and enable Family Sharing and, if under 18, Ask to Buy. Family Sharing and Ask to Buy are Apple's best supported approach to managing media and application purchases for children. Like several programs designed for children they work reasonably well for child Explorers and less well for adult Explorers. With this program an "Organizer" (Guide) makes purchases and these are shared with up to 6 people. The "Ask to Buy" option can be applied to "family" members under age 18. Family Sharing can be combined with iPhone

Store credit — an Explorer could use both Family Sharing and their own credit.

Family Sharing has other advantages for Explorers, it makes it easy to share Locations, Calendars and Photos for example. I'll describe this in the chapters about these features.

Family Sharing has a few disadvantages too. In the absence of Restrictions family members may have access to inappropriate apps or media — and Restrictions can be complicated to enable. Not every app or media supports Family Sharing. "Ask to Buy" isn't available for over 18⁶, and even when it is enabled a user can download a previous or shared purchase without notification and, in some versions of iOS, without entering a password regardless of restrictions⁷.

Family Sharing is more complicated for the Guide than the above recommendation, but it's definitely worth considering. It's not perfect, but it's pretty good and when it works it's simpler for the Explorer.

Enter an Explorer's credit card with or without purchase restrictions. For many Explorers this should only be considered for a credit card with a fixed monthly spending cap and it may be advisable to use Restrictions to disable iPhone Store purchases or require a password for them. This is complicated, so read the Restrictions chapter carefully.

Enter a Guide or other caregiver's credit card with purchase restrictions. You can enter your own or someone else's credit card information (with their permission hopefully). This is a common practice but it may violate your credit card company rules and it can lead to some surprising bills. If you choose this route you will want to read the Restrictions chapter carefully.

Separate iCloud credentials from iPhone Store credentials. This is an older method that I think Apple will eventually discontinue. This is what my family has used. I mention it here for completeness, but I don't recommend it because I think it's going to go away and it adds complexity.

It is possible to setup an iPhone so that the iCloud and iPhone Store accounts have different credentials. In my family each of our Explorers have their own iCloud account, but they both use an iPhone Store Apple ID tied to my credit card. I enable Restrictions so they must enter the iPhone Store Apple ID password prior to purchases — and they don't know that password. So all new purchases must be done by someone who knows the password.

This method predates Apple's Family Sharing. It has some advantages over Family Sharing, but some disadvantage. For example, all content is shared across Guide and Explorer alike.

iPhone setup - Touch ID & Passcode

During initial iPhone setup an Explorer will be asked to create a Touch ID using the fingerprint sensor. When a Guide is doing iPhone setup this is often delayed until after the iPhone is setup. In this case you do it through the **Touch ID & Passcode** settings.

Touch ID setup is fairly simple, but there are some iPhone Store (App store, iPhones store) considerations. I'll describe those after the setup.

Typically you would register one or two prints for an Explorer, such as the right index finger and the left thumb. There's no need to enter every digit. If a digit isn't always recognized just enter it twice. Many Guides will want to enter their fingerprint too. This can be done at any time.

Even with Touch ID setup An Explorer will still need to know their iPhone unlock passcode because every so often the phone will require it — including after every restart. So the passcode can be longer than it might be without using Touch ID, but it must still be easy for an Explorer to remember and tap in.

Touch ID is used to unlock an iPhone, but it does more than that. It can also be used to make purchases. In Settings:Touch ID & Passcode there's an option to enable Touch ID for **Apple Pay** & the Store Accounts (**iTunes & App Store**). These can be turned off⁸ for most Explorers who are new to the iPhone. Apple Pay is particularly confusing. I discuss this in the Restrictions topic (below).

Touch ID and & Passcode includes other settings that can be turned off to make iPhone use simpler. I recommend turning off Voice Dial, Today View, Siri, Replay with Message, Home Control, and Wallet. They can be enabled later, but they all make it more complicated to use an iPhone. The one exception is to love Notifications View on, notifications are important for many of the apps I'll cover in later chapters.

Lastly leave Erase Data off! It's too easy for an impatient Explorer to enter a wrong password repeatedly and trigger this. Almost nobody needs this much iPhone security as long as they set a good device password.

iPhone setup - Medical information and owner information

Many iPhone users ignore the medical emergency information feature, but it is often important for an Explorer.

Apple calls their medical emergency information a "Medical ID". It's described in the User Guide's Health app section under Create a Medical ID and in an Apple Support document⁹. Briefly, launch Health.app then tap Medical ID in the bottom row. A Guide will enter Medical Conditions, Medical Notes¹⁰, Allergies & Reactions, Medications, and one or more Emergency Contacts (from Contacts list).

This ID information can be seen from a locked screen by an unauthenticated

user such as a paramedic. The emergency worker taps the home button and on the passcode screen taps “Emergency”. This shows the Emergency Call screen, and to the lower left of this screen there’s a “* Medical ID” text button. Many people who find an iPhone won’t know how to use this information, but emergency medical professionals should know to look.

iPhone setup - Siri

When doing initial setup of an Explorer’s iPhone a Guide may be asked whether to enable Siri or not. I recommend disabling Siri for an Explorer who is unfamiliar with this service. Siri can produce surprising behaviors when a home button is pushed for too long or someone says something that sounds like “Hey Siri”. At least at first it’s best to keep things simple. I’ll have more to say about Siri later in the book.

It’s easy to enable or disable Siri in Settings. Go there now to turn Siri off until an Explorer is used to working with the iPhone. Even after an Explorer is accustomed to an iPhone and is using the device I recommend turning off “Hey Siri”. It’s too easy to trigger that by accident with confusing results.

There is one item a Guide should configure in Siri Settings even when Siri is disabled — set “My Info” to the Explorer’s Contact (in a new phone this Contact will need to be created first). This information is used in a few places and it’s useful to set it up.

iPhone setup - Simplifying with Accessibility and more

The iPhone Accessibility settings are largely organized for users with vision, hearing, and movement problems. These may be very important for many Explorers but that’s a topic for another book. Apple’s iPhone User Guide and especially their Support pages have good discussions of Accessibility features like the VoiceOver screen reader.

One day there may be an Accessibility setting that would *simplify* the iPhone for Explorers with cognitive disabilities, but for now most Accessibility settings make the iPhone more confusing to use. For example, Magnifier enables a triple click shortcut to turn the iPhone into a great magnifying glass, but it’s too easy to trigger by accident.

There are a few accessibility settings that do simplify the user interface. For most Explorers, indeed for most iPhone users, 3D Touch is a low value feature that is mostly activated by accident. I recommend disabling it in Accessibility. Shake to Undo is often activated by accident — turn that one off too. If Vibration disturbs an Explorer that can also be disabled.

If an Explorer is bothered by “special effects” there’s an Accessibility setting

called Reduce Motion that can help. It gets rid of annoying effects that can bother some Explorers — and me! I turn it off on my iPhone.

If an Explorer is accidentally triggering Siri with the home button there's an option to turn that off in Accessibility Home Button. It's generally easier to just disable Siri though. Siri is surprisingly hard to use effectively, many iPhone users ignore her.

It's not part of Accessibility, but unintentional activation of "Control Center" can be confusing. Control Center is activated by stroking up from the bottom of the iPhone screen. It has two panes that can be exchanged by swiping left and right. One pane controls music and the like, another pane has handy shortcuts to Airplane mode, flashlight and so on. This behavior confuses most iPhone users and it can't be changed. I recommend at least using Control Center Settings to turn off Access Within Apps. With this setting an Explorer will switch to the Home screen before adjusting Settings.

If an Explorer strokes down from the top of the iPhone screen they activate the "Notification Center" screen. This shows up even if the iPhone is locked. Even though it's called the "Notification Center" it has *two* screens. One of them shows Notifications, the other shows "Widgets". This confuses almost every iPhone user!

I discuss Notifications in the next section. If you follow those recommendations the Notification Center will always be empty — which is a good thing for most Explorers!

Widgets are a quick way to access a few apps. They were more useful before Touch ID made unlocking quick; back then they were a good way to check the date and weather without entering a password. They are less useful now and for most Explorers they can be all be removed. They can't be removed from iPhone Settings, instead stroke down from the screen top and then find the Widgets screen. At the bottom of this screen is an "Edit" icon. Tap it and remove every Widget!

There are five ways to make the iPhone display easier to read for people who don't have perfect reading vision. Yes, this is confusing! Apple will probably revise these in future.

The first way is to buy a "Plus" sized iPhone. Text and everything else is a bit larger on Plus devices. These cost more money and are too big for many situations, but if you don't already own an iPhone this is something to consider.

The best option for most users, is to enable "Display Zoom" in the Display & Brightness. This causes few problems and is a great option for many iPhone users, including many users over age 45. It makes touch targets a bit bigger too, so it's helpful for Explorers who miss their taps.

There are more options in Accessibility if Display Zoom doesn't suffice. Larger Text works reasonably well as long as you don't enable "Larger Accessibility Sizes". Some application screen text will crowd together.

The next options are more problematic. Larger Text with "Larger Accessibility Sizes" enables super large text — but most apps have trouble with this text size.

Lastly there is a “Zoom option” in Accessibility, not to be confused with “Display Zoom” described above, that can be used to magnify parts of the screen. It can work very well for low vision users, but it is complex to use.

iPhone setup - Notifications and other distractions

Notifications are how the iPhone gets an Explorer’s attention through Sounds, Badges, and Banners/Alerts¹¹. You can change the Sounds for some apps, but most use the system standard Alert sound. Badges appear as red disks atop App icons showing counts of tasks undone. Banners float down over the screen even when an iPhone is locked.

Notifications can be ... distracting. Indeed, that’s the intent. Apps want attention, and Notifications are how they get attention.

Notifications can be a good thing. A ringing phone is a notification. Most people want to be notified of incoming iMessages — at least most of the time.

Notifications can also be an energy draining attention sucking black hole. Like Facebook notifications, for example. Each distraction cuts into an Explorer’s attention budget. For an Explorer who may struggle with managing distractions this can be more than a nuisance.

Happily it’s relatively easy to get control of Notifications. I recommend a Guide turn off almost all Notifications to begin with. Notifications can’t be locked by iPhone Restrictions, but if an Explorer turns on too many this can be a good learning opportunity¹².

Notification Settings are divide into two sections - GOVERNMENT ALERTS and the oddly named NOTIFICATION STYLE. I recommend turning AMBER Alerts off; in a city these are not rare and they are disruptive. Emergency Alerts are more of a judgment call, particularly for Tornado prone regions. I do turn these off.

The NOTIFICATION SYLE section holds all App notifications. When an App is installed it tries to turn on every Notification type. So this section needs regular maintenance! Fortunately it’s easy to turn off all Notifications for an App. Tap on the App name, then toggle Allow Notifications to off.

I recommend turning every Notification off except for Reminders.app, Calendar.app, FaceTime.app, Mail.app, and Messages.app. Even when Notifications are enabled I recommend turning “Show in Notification Center” off. The Notification Center confuses most users; it’s best to keep it empty.

There are other ways to adjust notifications, but the key thing is to limit what apps get to use up an Explorer’s attention budget and to keep the confusing Notification Center screen empty.

iPhone setup - Cellular Data and Basic Restrictions

In the introduction to this chapter I wrote “You don’t need to get everything done at once and you don’t need to get it all right. You’ll have lots of chances to come back and tweak the initial setup. So sit down with your favorite beverage and this chapter and get to work.”

I was thinking about configuring Cellular Data and Restrictions when I wrote that. This topic is big enough that it gets a chapter of its own later in the book. In this preview I’ll focus on some key things to consider during initial setup of an Explorer’s iPhone. For some Explorers this may be all you need to do.

If your Explorer has “unlimited data” then you can skip to the general restrictions discussion. Lucky you! Unlimited data plans are typically expensive though, and most Explorer’s don’t have that kind of money.

If your Explorer doesn’t have “unlimited data” a Guide has work to do. It would be easy to turn off all cellular data use, but that would disable features like Find Friends, Find iPhone, iMessage, Calendar updates and the like. So that’s not a Guide’s first choice — though it is simple!

The first thing to do is go to ‘iTunes & App Stores’ and make sure “Use Cellular Data” is turned off!¹³ *App Updates can easily consume all of a cellular data plan in a single day!*

The next step is to limit cellular data for installed apps. Sadly, Apple did not do their best work when they implemented this feature. You have to hunt around a bit. I recommend going through settings for Apple’s apps and disabling cellular data wherever appropriate — such as in TV, Music, News and Podcasts. Look at some third party apps too — Facebook will use a large amount of cellular data showing videos.

Next go to Apple’s Cellular settings. Apps show up here that have used cellular data in the past. That means you won’t see an App unless it’s already used cellular data! Yes, this is really annoying. You can see here how much data an app is used and you can disable the app if needed¹⁴. Consider turning off Cellular data for Photos — they can use a very large amount of data in surprising ways.

Once you’ve done the initial cellular data setup I recommend keeping an eye on data use for the first few days to weeks. The iPhone’s Cellular settings will show data use, you tap ‘Reset Statistics’ at the bottom to zero the readings. Unfortunately Apple doesn’t give third party apps a way to track data, so this is the best you can do on the phone. You can also connect to an Explorer’s mobile plan web site to track usage.

After configuring cellular data most of us will want to take a break. Then it will be back to Restrictions. These are important for many Explorers; I go into much more detail in a later chapter. There are some restrictions to consider enabling now — if only to simplify how the iPhone works.

When you tap on the Restrictions setting you’ll need to provide a 4 digit passcode (nothing longer, this isn’t terribly secure). *Be sure you don’t lose it!*

I recommend turning Siri & Dictation, AirDrop, CarPlay, and Apple Music Connect off for most Explorers to simplify the iPhone experience. You may want to turn off App Installation and In-App Purchases when starting out. Turning off App Installation also disables App updates; this turns out to be less of a problem than you might think. It's rare that an update to an App is a great improvement.

Some Explorers may also need to start iPhone use with Safari disabled or with Websites restricted to "Limit Adult Content" or "Specific Websites Only".

Depending on how an Explorer's store account is setup you may want iTunes and App purchases to require a password that only a Guide knows. There are two parts to this.

In Touch ID & Passcode make sure that Touch ID is *not* enabled for iTunes & App Store. If it isn't enabled then in iTunes & App Store there's an option for Password Settings¹⁵; set this to require a password (including for free apps). As long as an Explorer does *not* know their Apple ID password this option will allow a Guide to manage new App installation and in-App purchases even if App Updates are enabled.

iPhone setup - The home screen

The Home Screen is where the Explorer's smartphone experience begins. Most Explorers will learn to change the Home Screen to suit their own interests, but a Guide can help the initial experience with some initial setup. (The iPhone manual describes Home Screen setup well, I won't repeat that here.)

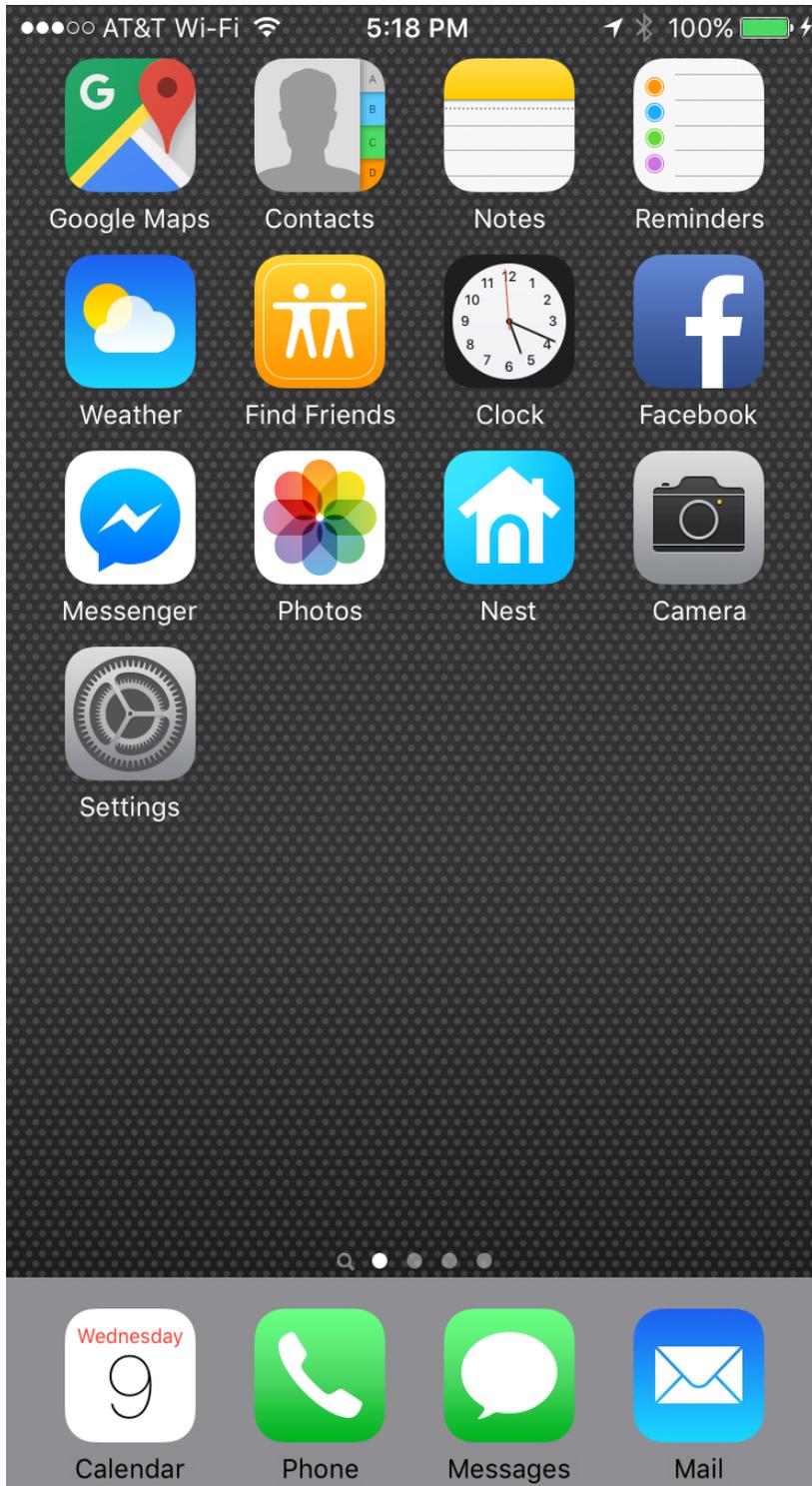
For a new Explorer I recommend a single screen of Apps that contains a Folder called "Other". Everything that is distracting or not of interest to the Explorer goes into "Other". In the beginning that may be most things!

A one screen setup is the simplest initial experience. There are fewer confusing screen changes with swiping. Swiping left (from right side of screen to the left side of the screen) doesn't do anything because there are no additional app screens. Swiping from screen top to down, or bottom to up, or right to left still bring up possibly confusing screens, but pressing the Home button brings the Explorer back to the Home Screen.

After initial setup most Explorers will change the Home Screen to their own tastes. This is sometimes an opportunity for negotiation. Some Explorers, for example, might limit the Home Screen to entertaining games and apps, while delegating productivity apps like Calendar.app and Notes.app to a secondary screen that's rarely visited. This may not fit a Guide's desire to further Explorer independent living!

The screenshot below shows a typical Home Screen configuration for a new Explorer and another for an Explorer who has been using an iPhone for a while. This is pretty simple to setup, but I'll mention a details.

The bottom row is special — even when additional screens are created to hold more apps it doesn't change. It's a good place for apps that display important icon Notifications — like Messages.app and Phone.app. The Clock icon displays the time of day in analog form, the top of the screen displays it in digital form.



iPhone setup - Backup and Photos

Every book on using technologies emphasizes how important it is to backup regularly. I'm not going to do that. For the iPhone Explorer backup is a good idea, but it's not absolutely essential.

The reason backup is less important now is that most of an Explorer's critical data will be "in the Cloud". It will be on Apple's servers, which are backed up by Apple. If an Explorer loses their phone and gets a new one, they will still have their Notes and Calendars and Email and Music and Videos¹⁶. The critical information, that must not be lost, is the Explorer's iCloud email address and password.

There are still reasons to Backup though. For one thing, of that setup work we've described in this chapter isn't in the Cloud! A Guide won't want to lose that work. Other apps, like games, may not store their data in the Cloud¹⁷. Only a backup can protect their data.

So even though it's not absolutely essential, it's still a good idea to backup. Unfortunately the iPhone won't do a backup over a cellular connection, even for an Explorer with unlimited data. Backup only happens to a device that's on a WiFi network¹⁸. It will happen automatically for an iPhone that's locked and plugged in, or it can be started manually (see iPhone User Guide for manual backup directions).

Apple enforces the WiFi-only backup limitation because most iPhones users have limited cellular data plans¹⁹. That limitation means, however, that Explorers without WiFi aren't getting any backup. The best advice I can give is for a Guide to do a periodic manual backup on a WiFi network. Many Explorers can also learn to do this at a local library, coffee shop, or public WiFi location.

Apple currently provides every customer with 5 GB of storage for backup and iCloud data free of charge. That's usually enough for a single iPhone — unless an Explorer likes to record videos. Videos, and to a lesser extent still images, are a problem for iPhone backup²⁰.

The problem is that "Photos" (videos and still images) use a *lot* of storage. Even if an iPhone has ample local storage, free accounts are limited to 5 GB — and once an Explorer hits that 5 GB limit they may not be able to backup anything else!

There are a few ways to manage the Photo storage problem. I go over them in a later chapter. To start with a Guide or Explorer can simply delete old video recordings from the iPhone to free up storage. A more aggressive option is to turn off backup of Photos (videos, images)²¹ and also turn off "iCloud Photo Library" and "My Photo Stream"²². With these settings iCloud storage won't be used, but a Guide or Explorer may still need to remove videos and images to free up space on an iPhone. There will also, of course, be no backup of images or videos.

iPhone setup - App and System updates and restarts

Congratulations! If you've made it this far your Explorer's iPhone is just about ready for use. Now you just need to keep it healthy.

One way to keep an iPhone happy is to periodically shut it completely down then restart it. This clears out the inevitable software gremlins. The User Guide describes how to do this — basically just push and hold the power button. Once a week is fine, but there's no harm in doing this every night. Some Explorers like to leave their iPhone powered off overnight²³, if they plug it in before powering down it will charge²⁴ (but, as discussed above, it won't backup).

Restarting periodically is a good way to keep an iPhone working smoothly, but it's not critical. After a couple of demonstrations most Explorers will learn to power cycle a misbehaving iPhone before calling for support. The bigger risk to iPhone and Explorer happiness alike are App updates and the dreaded System Software update (iOS update).

App Updates are the lesser problem. Most Explorers use only a limited number of apps and they tend to be well maintained. Sometimes an app update will bring disruptive changes or bugs, but that's unusual. On the other hand App Updates and "Automatic Downloads" can use a significant amount of cellular data²⁵. I recommend turning off all "Automatic Updates" switches as well as the "Use Cellular Data". With this setting a Guide or Explorer will use the App Store to update apps only when they want to. Which might be every few months.

System software updates, known as iOS updates, are a bigger threat to Explorer satisfaction. They come in two flavors - quarterly²⁶ "minor" or "point" updates and the yearly "major" updates.

The minor updates keep the version number before the "decimal" (point) unchanged. The iPhone will ask before applying these, but a Guide cannot prevent the update. If an Explorer is willing I recommend waiting a week or two before installing these.

The yearly major updates are scary. Apple can make big and confusing changes, and older phones may get slow after a new update. (Eventually iPhones age out of upgrade support — that can be a good thing!) I strongly recommend waiting at least a month after the initial release of a major update and even then first installing it on a Guide's iPhone. Unfortunately there's no way to prevent an Explorer from accepting a major update if one is offered. This is one time lack of WiFi can be a feature — the both major and minor updates require WiFi.

iPhone setup - Summary

There are a lot of Settings on an iPhone in addition to the ones I've described. It can be bewildering to look through them all even for an expert. I'll mention a few

of special interest to a Guide but these are fine points that can be left for future work.

I've listed the Settings a Guide might consider changing below in table form, including ones I've discussed above. The location of these settings may vary with iOS updates, usually you can find them by searching settings.²⁷ They are listed below in the order encountered when using iOS 10.3.1, I discuss Application settings in the chapters for each Application.

Setting	Recommendation
WiFi	Turn "Ask to Join Networks" off to reduce noisy prompts. The way Apple does WiFi automatic connections can be confusing, but if you turn WiFi off completely location finding doesn't work as well.
Bluetooth	Off to simplify use until needed
Cellular	See "Controlling data use", above. If an Explorer has unlimited data this is less important.
Notifications	AMBER alerts may be upsetting and are certainly disruptive. Turn them off. Emergency Alerts are much less frequent and may be valuable in tornado country. Application Notifications are disruptive, turn off all but the ones that your Explorer needs (example: Messages, Calendar) and for those turn off use of Notification Center.
Control Center, Access controls	To reduce confusing screen popups turn off both the "Lock Screen" and "Within Apps" options.
Do Not Disturb	If an Explorer sleeps with their iPhone nearby a Guide may schedule "Do Not Disturb" for evening hours. See the iPhone User Guide for advice on allowing calls from key people to still go through by "Allow Calls from Favorites" and adding names to Favorites.
General, About, Name	It's a good practice to give an Explorer's device a meaningful name other than "iPhone".
Spotlight Search	Turn off most options here to keep things simple. Do leave Calendar and Contacts as searchable.
Handoff	Disable. Any Explorer who can benefit from this will know to turn it on.
Accessibility	See "Accessibility", above. I recommend disabling 3D Touch, "Shake to Undo", and more.

Restrictions	See “Restrictions”, above. This is such a big topic I cover a part of it in a later chapter. With initial use it can be helpful to turn off Siri & Dictation and AirDrop and little used features like Apple Music Connect. They can be enabled later.
Keyboards	Consider disabling the Emoji keyboard if it is confusing — but many Explorers will enjoy using Emojis. Most of the spelling and correction options are helpful to most Explorers and can be left alone. Dictation can be disabled for most Explorers; it can be confusing if accidentally activated and it uses up keyboard space.
Display & Brightness	Auto-Lock should generally be set to 5 Minutes. Display Zoom is helpful for Explorers who may benefit from larger controls and icons. Oddly this is different, and more useful, than “Zoom” in Accessibility. Text Size appears here and in the Accessibility settings, it’s discussed in the Accessibility section above.
Sounds	Ringer and Alerts, Change with Buttons should be disabled. Otherwise Explorers will accidentally silence their ringer and alert. Really, everyone should turn this one off! May Explorers will want to choose a Ringtone they like (and will tolerate). Keyboard Clicks can be either irritating or helpful and should be reviewed with an Explorer.
Siri	See “Siri”, above. I recommend turning Siri off when an Explorer is first working with an iPhone.
Touch ID & Passcode	See “Touch ID”, above. Touch ID is a fabulous feature for Explorers, but turning off most of the “Allow Access When Locked” features makes the iPhone simpler.
iTunes & App Store	See Store accounts, above. Automated downloads can be confusing, so in general you will turn this feature off. Be sure to turn off “Use Cellular Data” unless an Explorer has a generous data plan.
Wallet & Apple Pay	Disable this for most Explorers, especially the double-click home button shortcut.
Widgets	From the Widget Screen (stroke down from screen top) remove every Widget

¹ Ok, so there’s also a WiFi option, but almost nobody does that.

² Special Needs Answers. Credit Card Care for People with Special Needs. 2017/04/23. <http://specialneedsanswers.com/credit-card-care-for-people-with->

[special-needs-12921](#)

³ <https://support.apple.com/en-us/HT201783>. Apple mixes this up with gifting credit as below. I think they should separate these methods better.

⁴ In the standard setup I describe Apple makes it appear that the Apple ID and iCloud ID are the same thing. Behind the scenes they are different systems.

⁵ <https://www.apple.com/itunes/gifts/>

⁶ At the time of writing if Ask to Buy is enabled on a child it continues to apply post 18, but if it is disabled it cannot be reapplied.

⁷ This seems to change without notice between iOS versions. Restrictions are complicated!

⁸ There is nothing to stop an Explorer from again enabling Touch ID for Store purchases. The good news is that if Restrictions (see below) are set to require entry of a password for Apple Store purchases then the first time Touch ID for purchases is tried that password will be required.

⁹ <https://support.apple.com/en-us/HT207021>

¹⁰ This is also a good place to put directions on how to return a lost device.

¹¹ There's an option in iOS Notification settings to switch the Alert Style for an unlocked iPhone between Alerts and Banners. Alerts stay up until they are dismissed, Banners appear briefly then go away. This is so obscure almost nobody knows about it. Forget you read this.

¹² If an App like Facebook is too distracting it may, of course, be a candidate for removal depending on the needs of an individual Explorer.

¹³ In the restriction chapter I talk about locking cellular settings so an Explorer doesn't change them and exhaust their data plan. This particular setting can't be locked unfortunately.

¹⁴ An Explorer can enable them of course. These can be locked but Apple didn't do very well with that feature either. I talk about this in the Restrictions chapter.

¹⁵ If Touch ID is enabled for iTunes & AppStore then the option doesn't show up. That is confusing.

¹⁶ There are always exceptions, but this rule is generally true.

¹⁷ Many do these days.

¹⁸ It's also possible to backup to a computer using iTunes, see the manual for details. Apple is moving away from using an iPhone with iTunes though.

¹⁹ I wish they'd enabled a manual override, but there's no doubt iPhone settings are already too complicated.

²⁰ In Apple land sometimes Photos means "images and video", sometimes it means just images. It's kind of annoying.

²¹ It's not obvious how to do this though. See <https://support.apple.com/en-us/HT204247> and follow the directions carefully.

²² In Photos & Camera settings, see User Guide.

²³ My oldest son, for example. I don't know why, but I think it's related to his instinct for keeping things neat and organized. He deletes all text messages for

example.

²⁴ If an iPhone is powered off then plugged in it will just restart.

²⁵ Cellular data use is only enabled for downloads under 100MB, but those can add up fast!

²⁶ Typically every 2-4 months.

²⁷ There is room for improvement in how Apple organizes settings. I'd love them to expand the "Learning" area of Accessibility settings to include these options.