

Microsoft OFFICE for iPad

An Essential Guide to Microsoft Word, Excel,
PowerPoint, and OneDrive



TOM NEGRINO

Office

for iPad

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Excel, PowerPoint, and OneDrive

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PEACHPIT PRESS

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This book was written in honor of the many members of my family and friends whose love and support helped me get through writing it at an especially distressing and difficult time in my life. My special appreciation to David and Care Morgenstern for their warm food and warmer friendship.

Most of all, I dedicate the book to my wife Dori, without whom I could not have made it.

About the Author



Tom Negrino is the author or co-author of nearly 50 books, covering such diverse topics as Microsoft Office, iCloud, OS X, Dreamweaver, JavaScript, Keynote, CSS, and more. He is a longtime contributor to *Macworld* and other magazines. He's lived in the Sonoma wine country with his wife and frequent collaborator, Dori Smith, since they fled the Los Angeles area in 1999.

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CHAPTER 4

Beginning with the Office Apps

In this chapter, you get started working with the Office for iPad apps. You see how to create new documents and save them, to either your OneDrive cloud storage or to your local iPad storage. You also learn how to share and print documents from the iPad apps.

And because this is the chapter where you begin working with documents on the iPad, you also learn about how to work in the Office apps that have been adapted for use in a touch environment like the iPad, rather than the versions of Office you've been used to using for years, which rely on menus, a keyboard, and mouse.

Creating New Documents

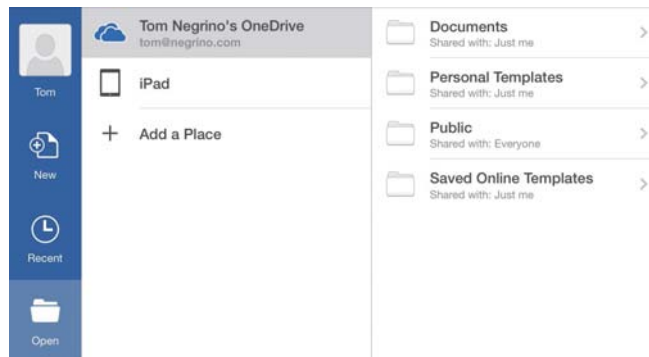
Working with any documents in the Office for iPad apps requires that you be signed in to your Office 365 account, and I'm going to make the assumption in this and subsequent chapters that you have already done so, as discussed in Chapter 2.

To create a new blank document in Word, Excel, or PowerPoint, you follow the same basic procedure. Follow these steps:

1. On the iPad, tap the icon for the app you want to work in. We're using Word in this example.

The app opens to the file manager, and is set to the Open tab by default (4.1).

4.1 You use the file manager to access files from either your OneDrive or the iPad's internal storage.



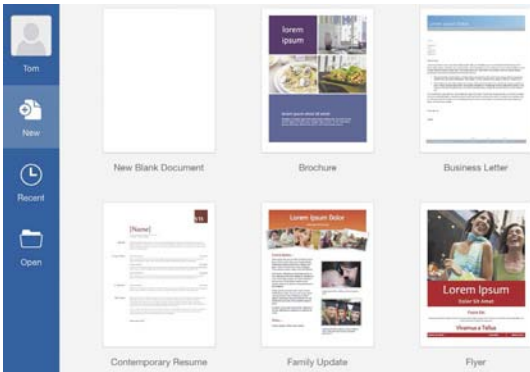
2. Tap the New icon.

The New screen appears (4.2), and contains a blank document template at its upper-left corner, as well as some other templates (we'll discuss those other templates in Chapter 5).

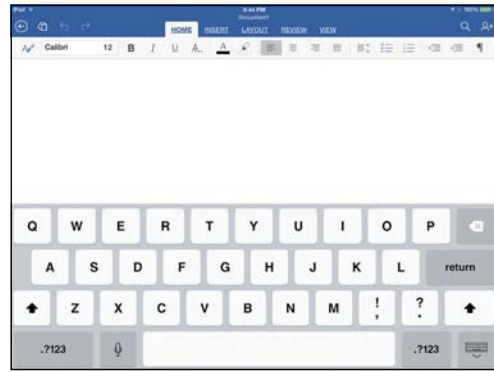
3. Tap New Blank Document (in Word), New Blank Workbook (Excel), or Office Light (PowerPoint) template.

► **TIP** In PowerPoint, there really isn't a concept of a completely blank document, since every presentation comes with styles, master slides, and slide formats. The Office Light template is a stark, predominantly white template that is as close as you can get to blank in PowerPoint.

The new document opens, ready for editing (4.3).



4.2 Use the first listed template to create a blank document.



4.3 Word has created a new document, ready for you to fill it with your brilliance.

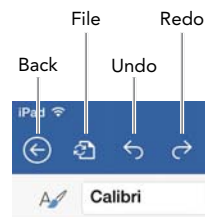
In 4.3, you can see that the onscreen keyboard is displayed. That was because I didn't have an external Bluetooth keyboard connected to my iPad at the time. When a Bluetooth keyboard is connected, the onscreen keyboard doesn't appear.

Saving and Naming Documents

From one standpoint, you don't need to do anything to save your Office for iPad documents, because from the moment it's created it's autosaved every few seconds. Because Microsoft understands that you're working on a mobile device, which you might put aside at any moment, the Auto-Save feature is turned on by default. New documents are autosaved to the safest location, your iPad's internal storage, because it is inherently more reliable than a Wi-Fi connection to your OneDrive cloud storage.

After you have worked on a document for a while, you can check that it is automatically being saved to your iPad by tapping the File icon in the upper-left corner of the Ribbon (4.4). The File sheet shows that AutoSave is on and that changes are automatically being saved to your iPad (4.5).

- ▶ **NOTE** If you want, you can slide the AutoSave switch to Off, and a Save button will appear below the AutoSave control. From then on, with that document, you would need to save it manually. Given the benefits of automatically saving your document, I don't see why you would want to do that, but you can if you like.



4.4 You'll do most of your file manipulation with the Back and File buttons in the Ribbon.

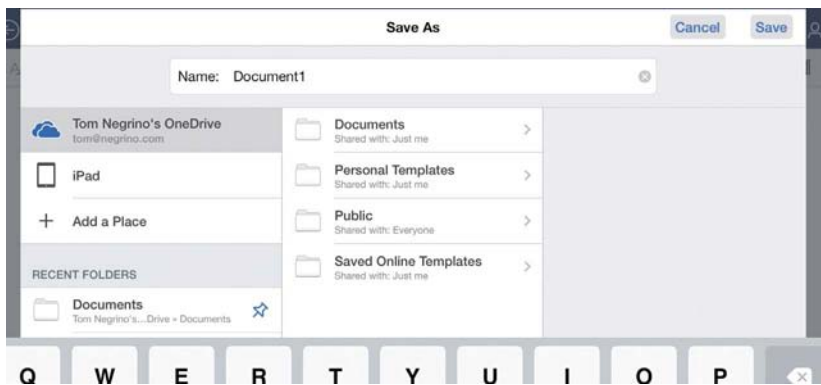


4.5 This File sheet shows that this particular document is being automatically saved to the iPad's internal storage.

Though the document is being autosaved to your iPad now, you may prefer that it instead be saved to your OneDrive cloud storage so you can access it on other devices, and in the process also give the document a name. Follow these steps:

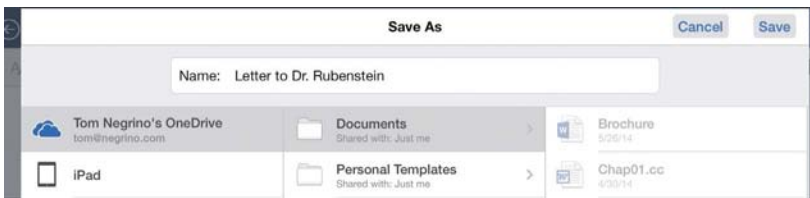
1. Tap the File button on the Ribbon.
The File sheet appears, as shown in 4.5.
2. Tap Name.
The Save As dialog appears (4.6).

4.6 By default, your OneDrive is selected as the default location for saving a document.



3. In the Name field, replace the default name with the name you want.

- By default, the storage location for your document is your OneDrive; tap a OneDrive folder to choose where you want to store the document (4.7).



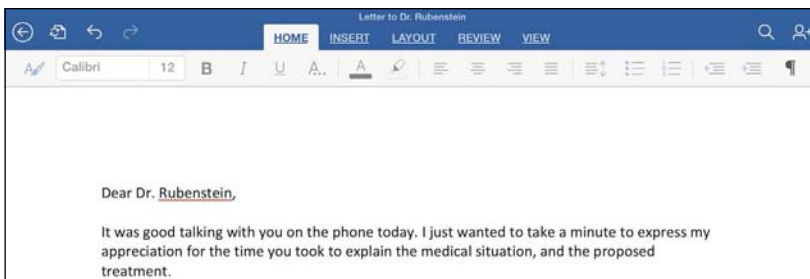
4.7 The Save As dialog gives you the chance to name the document, which will be saved in my OneDrive's Documents folder.

Note that you can also choose to continue saving the document to your iPad's internal storage by simply tapping iPad in the Save As dialog. Wherever you choose to save the document, to the cloud or local storage, that will become the location where the document is autosaved from then on.

- Tap Save.

The file gets saved to your selected location, and you are returned to the document for further editing (4.8).

- NOTE** Even though the file started out as being autosaved to your iPad's internal storage, once you save and name it, the file is moved to your selected storage location. If you save the file to your OneDrive, you won't find a vestigial copy of it in your iPad storage.

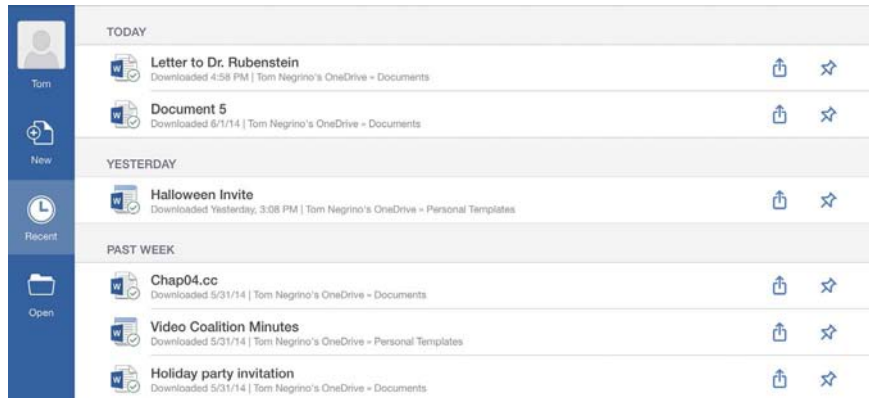


4.8 After the first time you save a document, Word assumes you want to continue working on it.

Opening Documents

When you launch one of the Office for iPad apps, it tries to help you get to work as soon as possible by opening to the Recent tab of the file manager (4.9). In the Recent tab, files are sorted and grouped chronologically.

4.9 The file manager's Recent view gives you a chronological retrospective of your work.

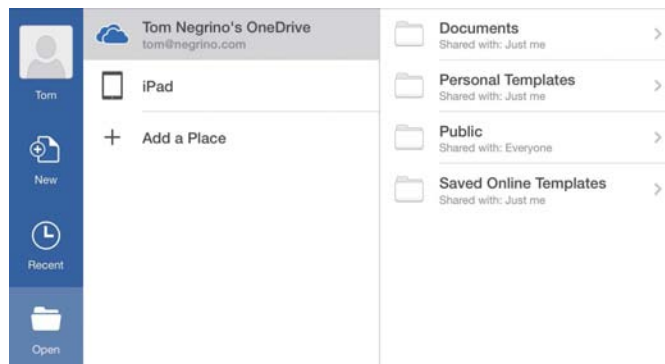


To open one of the documents on the Recent tab, simply tap on the document.

To open documents that aren't shown on the Recent tab, tap Open; then follow these steps:

1. In the first column, tap to select the storage location for the document: your OneDrive, your iPad's internal storage, or (if you're working in a business) a SharePoint server (4.10).

4.10 Tap to select your OneDrive as the location for the document. Your OneDrive's folders appear.



- If you chose your OneDrive in Step 1, tap the folder that contains the document you're looking for; then tap to select and open the document you want.

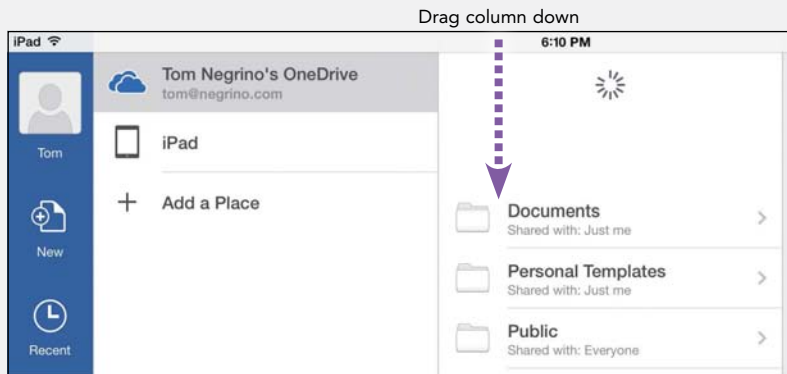
or

If you chose iPad in Step 1, tap to select and open the document you want. (There are no folders in your iPad's internal storage.)

The document opens.

Refreshing Your Online Storage View

Your OneDrive storage is dynamic, and the contents of it may have changed since the last time you viewed it in the file manager of one of the Office for iPad apps. You can refresh the view from the server by tapping and dragging downwards on any of the columns in the file manager, which will refresh the view for that category in the file path. For example, if you want to refresh the folders on your OneDrive, tap and drag the folder column down (4.11). You see the standard "waiting" icon for a second at the top of the column; then the iPad will check with the OneDrive server, the view will refresh, and the column will return to normal.



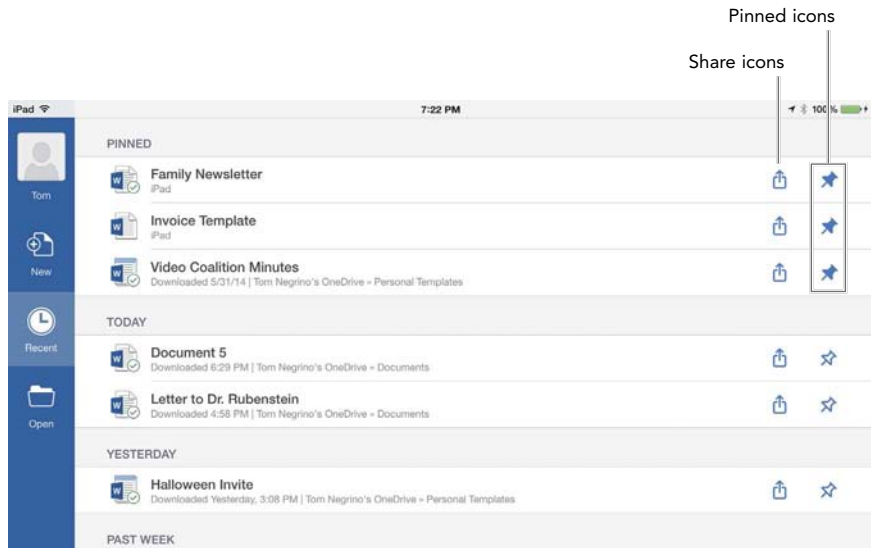
4.11 Drag down in a column to refresh the column's contents from the server.

That being said, I've experienced buggy behavior from the OneDrive system where I renamed a file on my Mac, OneDrive reported that the changes were synchronized, but the file didn't change its name on my Windows machine or iPad for hours. This may just be a bug that will be fixed soon, but you should occasionally make sure your file are changed as you expect.

Pinning documents

There's a way to keep frequently used documents available at the top of the Recent tab, ready for easy access: *pin* them. When you pin a document, a new Pinned section appears at the top of the Recent screen (4.12).

4.12 Frequently used documents can be pinned to the top of the Recent list.



To pin or unpin a document, follow these steps:

1. In any of the Office for iPad apps, switch to the file manager.
2. If it isn't already set to the Recent tab, tap Recent.
3. Find the files that you want to pin to the top of the Recent list, and tap the pin icon to the right of their file names.

A new Pinned section appears in the Recent list, with the file in it.

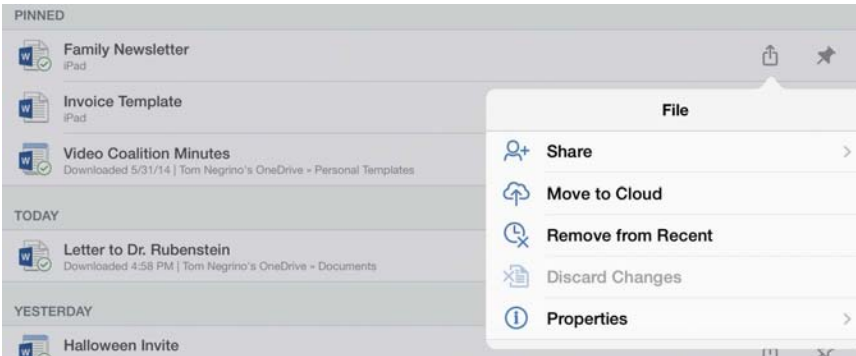
or

To unpin files and remove them from the Pinned section, tap the pin icon to the right of their filenames.

- ▶ **NOTE** Pinning a document only has an effect in the Recent list; it doesn't matter in the Open screen or in the OneDrive app.

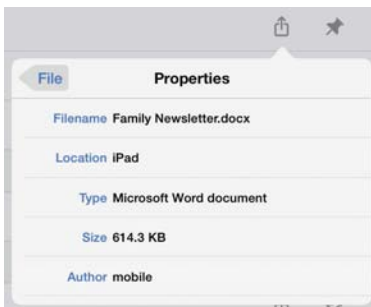
Managing recent documents

The Recent list allows you to make some other changes to your files. Tapping the Share icon for a file in the Recent list displays a File sheet (4.13) with several functions:



4.13 Tap the Share icon for a file in the Recent list to show additional management abilities.

- **Share** is discussed in the next section.
- **Move to Cloud** is only active if the selected file resides in the iPad's internal storage. Tapping this command brings up a Choose Name and Location dialog that allows you to move the file to OneDrive.
- **Remove from Recent** removes the selected file from the Recent list, allowing you to declutter the list.
- **Discard Changes** is only active if you have turned autosave off for the document and allows you to abandon any changes you made to the document.
- **Properties** shows you additional information about the document (4.14).

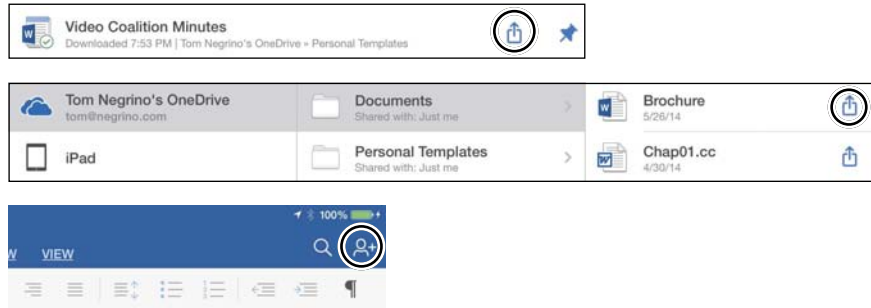


4.14 The Properties sheet gives you useful information about the document.

Sharing Documents

From any of the Office for iPad apps, you can share your documents with other people by tapping a Share icon in the Recent list of the file manager; from a Share icon in the Open list in the file manager; and from a Share icon in the Ribbon of the app (4.15).

4.15 Share icons are available to you in the Recent list (top); the Open list (middle); and in the document's Ribbon (bottom).



Tapping any of these Share icons allows you to share the document in one of three ways:

- **Email as Link** creates an email with a link to the document. You can choose to allow the recipient to View Only or View and Edit the document. Your file must be on OneDrive to use this option.
- **Email as Attachment** creates an email with the document as an attachment to the email. If the file is on your iPad, rather than on OneDrive, this is the only share option available to you.
- **Copy Link** is similar to Email as Link, except that it just gets a link and doesn't create an email. It's useful for when you want to include a link in a Web page or social media message. Your file must be on OneDrive to use this option.

To share a document, follow these steps:

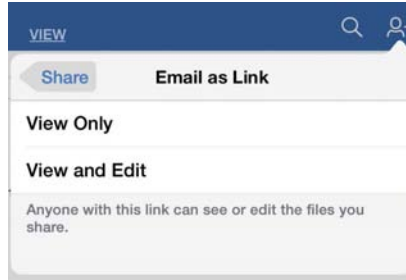
1. Tap the Share icon.

If you are in the Recent or Open list of the file manager, use the Share icons to the right of the file name. If you are editing a document, use the Share button at the right edge of the app's toolbar.

The Share sheet appears (4.16).



4.16 The Share sheet lets you share the document as an email or as a link.



4.17 The Email As Link sheet lets you choose whether the recipient will be able to only view or edit your document.

2. To share a link, tap either Email as Link or Copy Link.

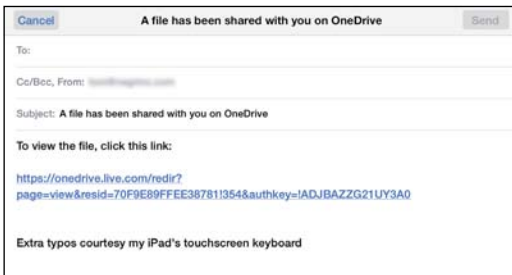
A second sheet appears, giving you the option to allow the recipient to either View Only or View and Edit the document (4.17).

3. Tap the option you want.

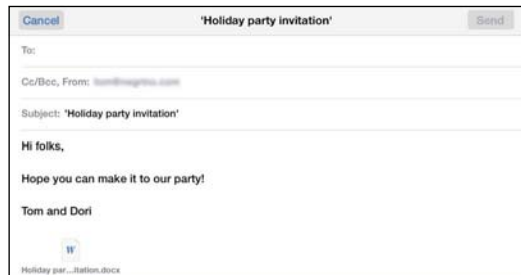
If you are emailing the link, an email message appears, containing the link (4.18). Fill out the email message and send it on its way. If you chose to copy the link, the link is placed on the Clipboard, ready for you to switch to another app and paste it in.

or

If you chose to email the document as an attachment, an email message appears, with the document included (4.19). Address and send the message.



4.18 The email message contains the link to the shared document.



4.19 This email message contains the shared document as an attachment.

Printing Documents

To print from the iPad, you must have an AirPrint printer available on your network, or have software running on a Mac or other hardware that allows a printer to be seen as an AirPrint device. Follow these steps:

1. Open the document you want to print in one of the Office for iPad apps.

2. Tap the File icon; then tap Print (4.20).

The Printer Options sheet appears (4.21).

3. Tap Select Printer.

The Printer sheet appears, showing you the selection of printers on your network (4.22). In my case, I have software running on two devices that allow me different printing and virtual printing options.

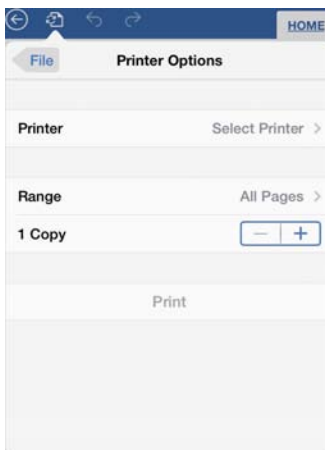
4. Tap the printer you want to use.

The Printer Options sheet reappears.

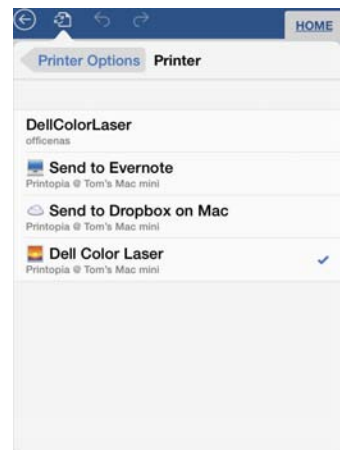
5. Make changes, if needed, for page range, the number of copies, and any printer options your printer may make available; then tap Print, which is now active.



4.20 Begin printing by tapping the File icon in the Ribbon.



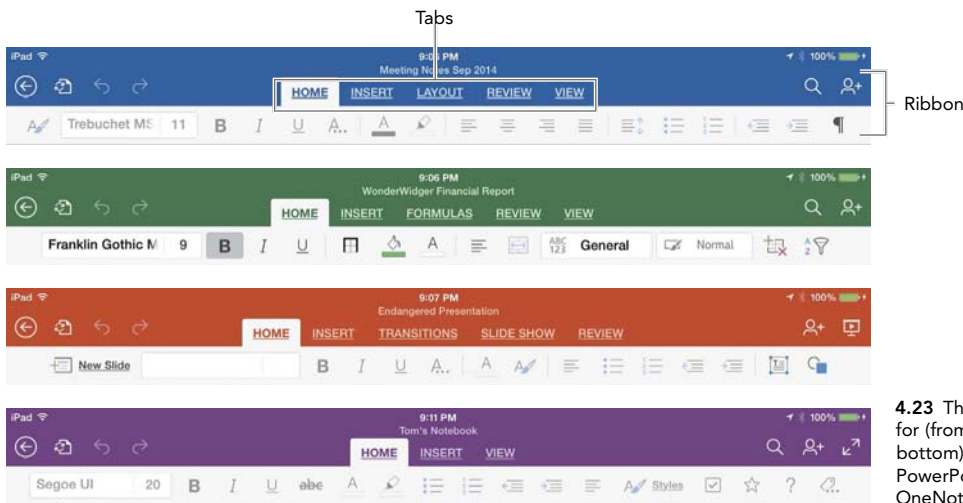
4.21 You need to select your printer from the Printer Options sheet.



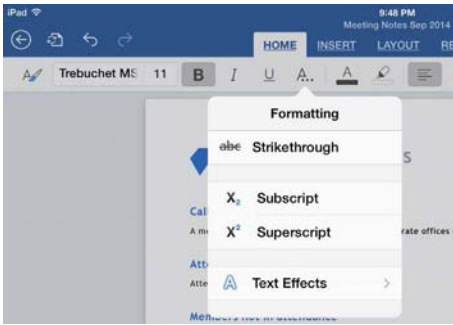
4.22 Choose your printer from the displayed options.

Introducing the Office for iPad Interface

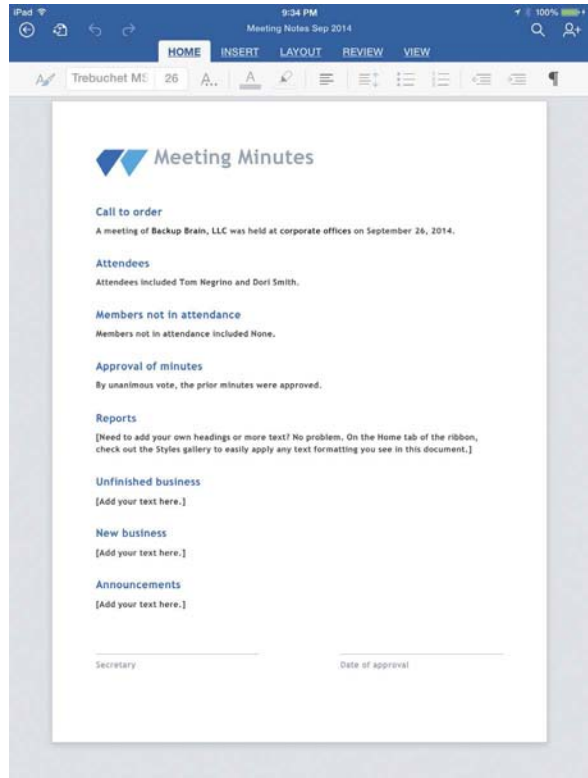
The interfaces of all the Office for iPad apps are intentionally similar to recent desktop versions of Microsoft Office. As befits the iPad, the apps have been pared down to better use the touch interface, but they still have the Ribbon, the toolbar at the top of the screen, split into tabs that logically group together the different functions of the app (4.23). Each tab has controls that make sense for it; for example, the Home tab in each app contains a toolbar with the most-often-used controls, as determined by many thousands of hours of user-interface research. Tap the name of a tab to display the tools related to the task at hand. When certain objects are selected in a document, contextual tabs appear, offering controls and options related to that object (which could be a table, an image, a chart, or other document elements). If you need a little more room on the page, tap a tab name, which hides or shows its controls.



Some controls on the Ribbon have options that appear in a sheet when you tap the control (4.24). But Microsoft has actually done a better job with adapting the Office apps for iPad than it has adapting them for Windows tablets, which still have user interface elements more suited to mice and keyboards, such as dialog boxes.



4.24 Some Ribbon controls have additional options.



4.25 You can use Word in portrait (shown here) or landscape mode, and you can zoom the document as you like.

At the left side of the Ribbon in all the apps, you'll find four buttons (4.4): Back, which brings you to the file manager; File, which displays the File sheet discussed earlier in this chapter; and the Undo and Redo buttons. On the right edge of the Ribbon is a Share icon allowing you to share the document and a Find icon allowing you to search the document. (PowerPoint lacks this button.)

Below the Ribbon is a document area. All of the apps conform to the standard iPad method of resizing your document view. Just pinch and spread your fingers to zoom the document as needed (4.25). All the apps except for PowerPoint work in either landscape or portrait mode; PowerPoint only works in landscape orientation.

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