Microsoft

Microsoft Office for iPad

Step By Step

- Easy lessons for essential tasks
- Big full-color visuals
- Skill-building practice files

Joan Lambert

Microsoft

Microsoft Office for iPad Step by Step

Joan Lambert

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Introduction

Welcome! This *Step by Step* book has been designed so you can read it from the beginning to learn about the infrastructure that supports the Microsoft Office for iPad apps, the common user interface elements, and the skills you can use when working in any of them; and then build your skills as you learn to perform increasingly specialized procedures. Or, if you prefer, you can jump in wherever you need ready guidance for supporting the apps or performing tasks in Microsoft Word for iPad, Excel for iPad, PowerPoint for iPad, and OneNote for iPad. The how-to steps are delivered crisply and concisely—just the facts. You'll also find informative, full-color graphics that support the instructional content.

Who this book is for

Microsoft Office for iPad Step by Step is designed for use as a learning and reference resource by home and business users of Office programs who want to use Word, Excel, PowerPoint, and OneNote to create and edit documents, workbooks, presentations, and notebooks on iPads. The content of the book is designed to be useful for people who have previously used Word, Excel, PowerPoint, and OneNote on other platforms and for people who are discovering Office apps for the first time.

The *Step by Step* approach

The book's coverage is divided into parts representing general Office app skills or specific apps. Each part is divided into chapters representing skill set areas, and each chapter is divided into topics that group related skills. Each topic includes expository information followed by specific procedures. At the end of the chapter, you'll find a series of practice tasks you can complete on your own. You can use the practice files that are available from this book's website to work through the practice tasks, or you can use your own files.

Download the practice files

Before you can complete the practice tasks in this book, you need to download the book's practice files to your Microsoft OneDrive or OneDrive for Business storage drive from *http://aka.ms/iPadOfficeSBS/files*. Follow the instructions on the webpage.

IMPORTANT The Office for iPad apps are not available from this website. You should install those apps before using this book.

You can open the files that are stored on your OneDrive from within the Office for iPad apps and save a duplicate copy of each file on your iPad. The apps automatically save changes to the practice files. If you later want to repeat practice tasks, you can download the original practice files again.

SEE ALSO For information about opening and saving files, see "Create, open, and save files" in Chapter 3, "Create and manage files."

The following table lists the practice files for this book.

Chapter	Folder	File
1: Office for iPad basics	iPadOfficeSBS\Ch01	None
2: Get connected	iPadOfficeSBS\Ch02	None
3: Create and manage files	iPadOfficeSBS\Ch03	NavigateOffice.docx OpenFiles.xlsx PrintSheets.xlsx PrintSlides.pptx SearchReplace.docx SearchScope.xlsx SendCopy.pptx SendLink.xlsx SendReview.docx
4: Create professional documents	iPadOfficeSBS\Ch04	ArrangeText.docx FormatParagraphs.docx FormatText.docx PastePractice.docx StructureContent.docx

Chapter	Folder	File
5: Add visual elements to documents	iPadOfficeSBS\Ch05	ArrangeImages.docx CreateLists.docx CreateTables.docx FormatPictures.docx FormatShapes.docx
6: Enhance document content	iPadOfficeSBS\Ch06	ConfigurePages.docx CreateColumns.docx CreateTextBoxes.docx InsertReferences.docx ReviewContent.docx
7: Store and retrieve data	iPadOfficeSBS\Ch07	DisplayData.xlsx EnterData.xlsx ManageCells.xlsx ManageStructure.xlsx ManageWorksheets.xlsx
8: Process and present numeric data	iPadOfficeSBS\Ch08	CreateCharts.xlsx CreateTables.xlsx PivotData.xlsx ProcessData.xlsx ReviewComments.xlsx
9: Create compelling presentations	iPadOfficeSBS\Ch09	AddGraphics1.pptx AddGraphics2.docx AddText1.pptx AddText2.docx AddText3.xlsx ChangeSize.pptx ManageSlides.pptx
10: Prepare and deliver slide shows	iPadOfficeSBS\Ch10	AnimateTransitions.pptx EnterNotes.pptx ManageRecordings.pptx PresentShow.pptx
11: Store information in digital notebooks	iPadOfficeSBS\Ch11	MoveNotes.one StoreNotes.one
12: Locate and share notebook content	iPadOfficeSBS\Ch12	ShareNotes.one

Adapt exercise steps

This book contains many procedures for performing tasks in Word, Excel, PowerPoint, and OneNote on your iPad. The procedural instructions use this format:

1. To select the paragraph that you want to format in columns, triple-tap the paragraph.
2. On the **Layout** tab, tap **Columns** to display the scrollable menu of column layout options.
3. On the **Columns** menu, tap **Three**.

On subsequent instances of instructions that require you to follow the same process, the instructions might be simplified in this format because the working location has already been established:

1. Select the paragraph that you want to format in columns.
2. On the **Columns** menu, tap **Three**.

The instructions in this book assume that you're interacting with on-screen elements on your iPad by tapping the screen (with your finger or a stylus) and interacting with on-screen elements on desktop computers by clicking (with a mouse, touchpad, or other hardware device). If you're using a different method—for example, if you have an external keyboard connected to your iPad or if you use a touchscreen computer—substitute the applicable tapping or clicking action when you interact with a user interface element.

Instructions in this book refer to iPad user interface elements that you tap on the iPad screen as *icons*, to Office app user interface elements that you tap on the iPad screen as *buttons*, and to physical buttons that you press on the iPad device as *buttons*, to conform to the standard terminology used in documentation for these products.

When the instructions tell you to enter information, you can do so by typing on a connected external keyboard, tapping an on-screen keyboard, or even speaking aloud, depending on your iPad or computer setup and your personal preferences.

Images in this book depict the iPad interface as it appears when the iPad is oriented horizontally. This maximizes the ribbon width in the Office for iPad apps so the buttons aren't crowded. (And, as a bonus, the horizontally oriented images require less vertical space on the page than vertical images, leaving more space available for words.) You can orient your iPad vertically or horizontally depending on your preference. For example, when the ribbon and on-screen keyboard are both open, you might want to work with your iPad oriented vertically to have more space available between those elements. When the iPad is oriented vertically, some elements of the Office app user interface might appear slightly different from those depicted in the book. For example, some buttons on the ribbon might be represented by icons instead of words.

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- Print
- Copy and paste

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Store and retrieve data

7

Excel provides a practical yet powerful data management framework. You can store massive quantities of data within this deceptively simple structure, analyze that data, and present the resulting information in a variety of structures. The key ingredient in all of these tasks is the original data. The final presentation or analysis is only as good as the data it's based on. This "garbage in, garbage out" rule is true for many business tools, programs, and processes; Excel is no exception.

A worksheet can contain a vast amount of static and calculated data. You can structure worksheet content so that data is presented correctly on the screen and when printed, and you can format data so that it is easier for readers to locate and understand specific categories of information.

This chapter guides you through procedures related to creating workbooks and worksheets, managing worksheets and worksheet elements, populating worksheets with text or numeric data, modifying worksheet structure, and formatting data for presentation. It also includes procedures for efficiently displaying, filtering, and sorting data to provide specific information and perspectives.

In this chapter

- Create workbooks
- Create and manage worksheets
- Enter and edit data on worksheets
- Modify columns and rows
- Modify cells and cell content
- Manage the display of data

Practice files

For this chapter, use the practice files from the iPadOfficeSBS\Ch07 folder. For practice file download instructions, see the Introduction.

The Excel feature set

Excel for iPad has only a subset of the features of the full program. Here is a brief comparison of the features in each version. You can save and edit workbooks in a shared storage location by using multiple versions.

Excel for iPad features

After you sign in by using a Microsoft account, you can do the following:

- Create, manage, and print workbooks and worksheets.
- Format, find, replace, sort, and filter content.
- Insert pictures that are available on your iPad.
- Create formulas, Excel tables, and charts.
- Display conditional formatting and interact with data validation options, PivotTables, and comments.

The following premium features require that you sign in by using an account that is associated with a qualified Office 365 subscription:

- Insert and edit WordArt.
- Customize PivotTable styles and layouts.
- Add custom colors to shapes, and add shadows and reflection styles to pictures.

Excel Online features

You can use Excel Online to do the following:

- Coauthor workbooks in real time and edit macro-enabled workbooks.
- Display three-dimensional charts, slicers, Power Pivot tables and charts, and Power View sheets.
- Embed workbooks on webpages.
- Send and compile surveys.

For more information about Excel Online, visit *technet.microsoft.com/en-us/library/excel-online-service-description.aspx*.

Excel desktop version features

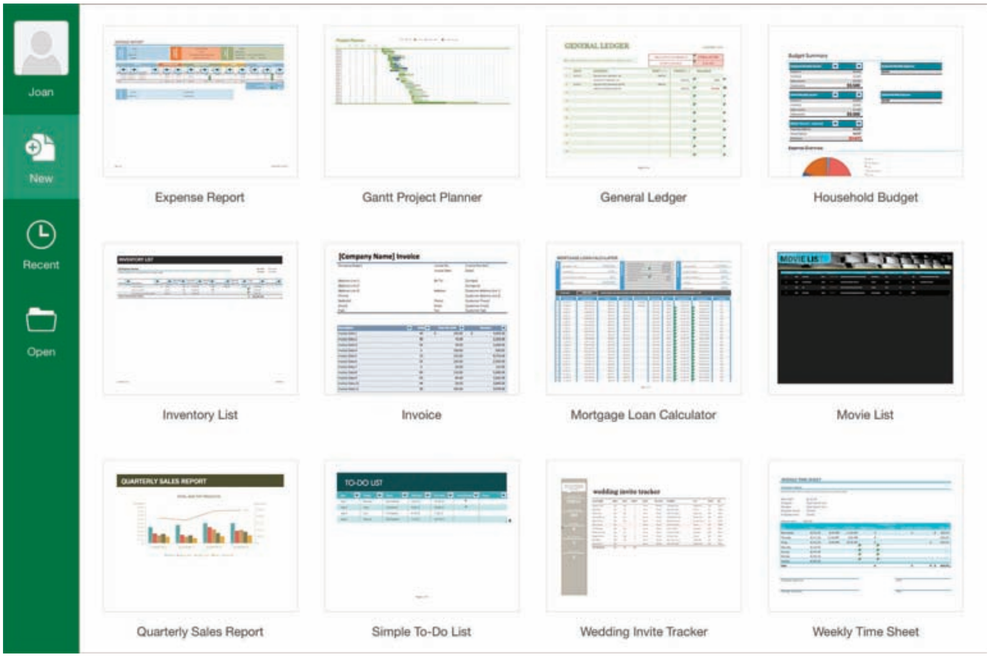
The desktop versions of Excel have the most functionality. For example, you can use Excel 2013 on a computer running Windows to do the following:

- Display multiple views of worksheets, split windows, multiple windows, and very large workbooks.
- Display and edit workbooks from remote storage locations offline.
- Insert equations and symbols.
- Insert pictures from local and online sources.
- Create SmartArt diagrams, and capture screen images.
- Copy and paint formatting.
- Insert header and footer content.
- Configure page layout options.
- Use apps and web resources to enhance content.
- Apply conditional formatting and sparklines.
- Sort and filter data by using slicers and timelines.
- Create and edit three-dimensional charts.
- Define named ranges.
- Audit formulas and require manual calculation of formulas.
- Analyze data by using the Quick Analysis tool.
- Create data validation rules, consolidate data, and perform conditional analysis.
- Group, subtotal, and outline data.
- Create PivotTables, Power Pivot data models, and Power View sheets.
- Create, save, and run macros.
- Use Office proofing tools.
- Protect workbook elements.
- Track changes, insert comments, and respond to comments.

Create workbooks

As with other Office files, you can create a blank Excel workbook or a workbook that contains content from a template. Excel templates focus more on purpose than on appearance; they provide structure and functionality for specific types of information.

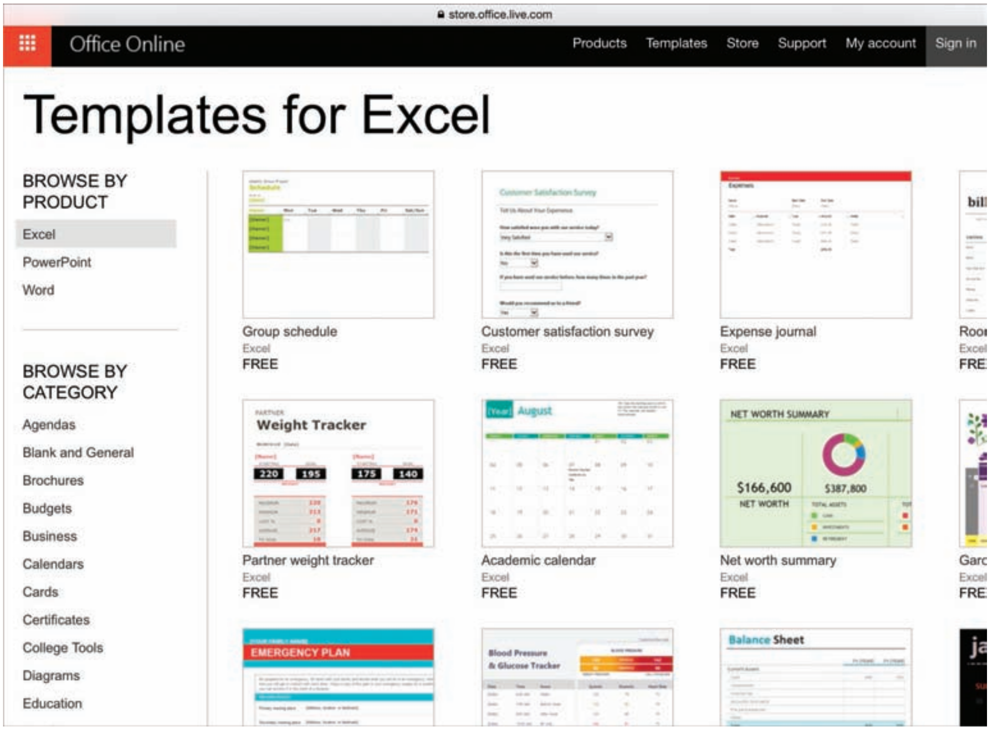
The templates that are available from within Excel for iPad range from a simple to-do list to a complex financial report and include expense reports, sales reports, household budgets, marketing budgets, time sheets, invoices, loan calculators, and ledgers. Most of the templates include basic calculations; some include advanced calculations and visual representations of data. Even if these don't meet your specific needs, they can serve as a good example of ways to collect, track, process, or present data.


Joan
New
Recent
Open
Expense Report
Gantt Project Planner
General Ledger
Household Budget
Inventory List
Invoice
Mortgage Loan Calculator
Movie List
Quarterly Sales Report
Simple To-Do List
Wedding Invite Tracker
Weekly Time Sheet

Excel for iPad has 16 built-in templates, including the blank workbook

Only the templates that are installed with Excel for iPad are available from the New page. Other workbook templates are available for Excel Online, and hundreds are available from within the desktop versions of Excel. If you create a workbook based on one of these templates and save the workbook to a shared storage location, you can then open and edit the workbook on your iPad.

You can access templates for Excel Online from your iPad by using Safari or another web browser to visit *store.office.live.com/templates/templates-for-Excel*.


store.office.live.com
Office Online
Products
Templates
Store
Support
My account
Sign in
Templates for Excel
BROWSE BY PRODUCT
Excel
PowerPoint
Word
BROWSE BY CATEGORY
Agendas
Blank and General
Brochures
Budgets
Business
Calendars
Cards
Certificates
College Tools
Diagrams
Education
Group schedule
Excel
FREE
Customer satisfaction survey
Excel
FREE
Expense journal
Excel
FREE
Partner weight tracker
Excel
FREE
Academic calendar
Excel
FREE
Net worth summary
Excel
FREE
Weight Tracker
EMERGENCY PLAN
Blood Pressure & Glucose Tracker
Balance Sheet

Additional templates are available online

To create a blank Excel workbook

1. In the Backstage view, on the **File** bar, tap **New**.
2. On the **New** page, tap **New Blank Workbook**.

To create a workbook from a built-in template

1. In the Backstage view, on the **File** bar, tap **New**.
2. Locate and then tap the thumbnail of the workbook template you want to use.

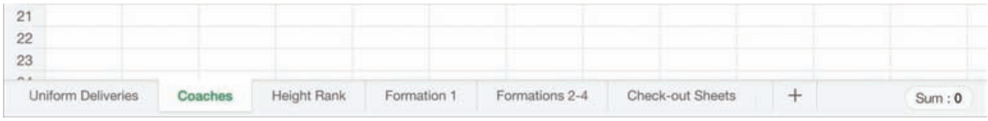
> **TIP** The processes of creating workbooks from Excel and Excel Online templates for use in Excel for iPad are the same as those of creating documents from Word and Word Online templates for use in Word for iPad. For step-by-step instructions, see "Create documents from templates" in Chapter 4, "Create professional documents." For general information about creating files in Excel for iPad and other Office apps, see "Create, open, and save files" in Chapter 3, "Create and manage files."

Create and manage worksheets

Workbooks provide structure for the storage of information, but you store the information on worksheets within the workbook. A worksheet provides a seemingly simple cellular structure that can store more than 17 billion data points.

TIP The current worksheet size limitation is 16,384 columns by 1,048,576 rows (which won't be a limitation for most Excel users). A single cell can contain up to 32,767 characters.

You don't have to store all your data on one worksheet. You can organize information on separate worksheets so that the content of each worksheet is easier to review and manage. You don't even have to store all related data on the same worksheet—you can easily reference data on other worksheets for purposes such as performing calculations or creating reports. You can also reference data in other workbooks, so it isn't necessary to have a copy of a worksheet that you reference from multiple workbooks in each of those workbooks.



Scroll sideways to access worksheet tabs that don't fit in the sheet tab area

SEE ALSO For information about referencing other worksheets and workbooks, see "Perform data-processing operations" in Chapter 8, "Process and present numeric data."

Add, rename, and remove worksheets

A new, blank Excel workbook contains one worksheet named *Sheet1*. You can add more worksheets to the workbook for the purpose of storing or displaying data, and give each worksheet a meaningful name. If you want to use an existing worksheet as a starting point for another, you can make a copy of the worksheet, rename the copy, and then modify the data on the copy. The data on the copy is not linked to the data on the original worksheet.

To select or display a worksheet

1. In the sheet tab area, tap the worksheet tab.

To add a worksheet to a workbook

1. In the sheet tab area, to the right of the existing worksheet tabs, tap the **Insert Worksheet** button, which is labeled with a plus sign (+).

To create a copy of a worksheet

1. Display the worksheet that you want to copy.
2. Tap the active worksheet tab to display the shortcut bar.
3. On the shortcut bar, tap **Duplicate**.

To rename a worksheet

1. Display the worksheet that you want to rename.
2. Double-tap the active worksheet tab to activate the worksheet name for editing and display the on-screen keyboard.
3. Enter the new worksheet name, and then do one of the following:
    - Tap anywhere on the worksheet.
    - On the on-screen keyboard, tap **Done** or tap the **Keyboard** key.

IMPORTANT The Undo command does not reverse actions such as renaming, hiding, and deleting that you perform on worksheet tabs.

To delete a worksheet from a workbook

1. Display the worksheet that you want to delete.
2. Tap the active worksheet tab. Then on the shortcut bar, tap **Delete**.

TIP You can display charts and other visual representations of data on worksheets with their supporting data, or you can move them onto their own worksheets. In some versions of Excel, you can export a chart from a worksheet to its own chart sheet. For more information, see "Display data in charts" in Chapter 8, "Process and present numeric data."

Move and hide worksheets

Many workbooks contain multiple worksheets. The data you store or display on individual worksheets might exist independently or interact with content on other worksheets. For example, you might:

- Store data for individual time periods or projects on separate worksheets.
- Store static information such as resources, list options, and holiday dates on one worksheet and reference that information in calculations on several other worksheets.
- Display a chart on a worksheet that is separate from the data that supports it.
- Display data from multiple worksheets on a summary worksheet.

You can organize worksheets in a workbook by reordering them.

If you don't need to have the information on a worksheet immediately available, or if you want to protect or conceal a worksheet, you can hide it. Hiding a worksheet removes the worksheet tab from the sheet tab area on the status bar but doesn't remove any data.

To move a worksheet within a workbook

1. Display the worksheet that you want to move.
2. In the sheet tab area, tap and hold the active worksheet tab, and then drag it to its new location.

To hide a worksheet

1. Display the worksheet that you want to hide.
2. In the sheet tab area, tap the active worksheet tab. Then on the shortcut bar, tap **Hide**.

To unhide a worksheet

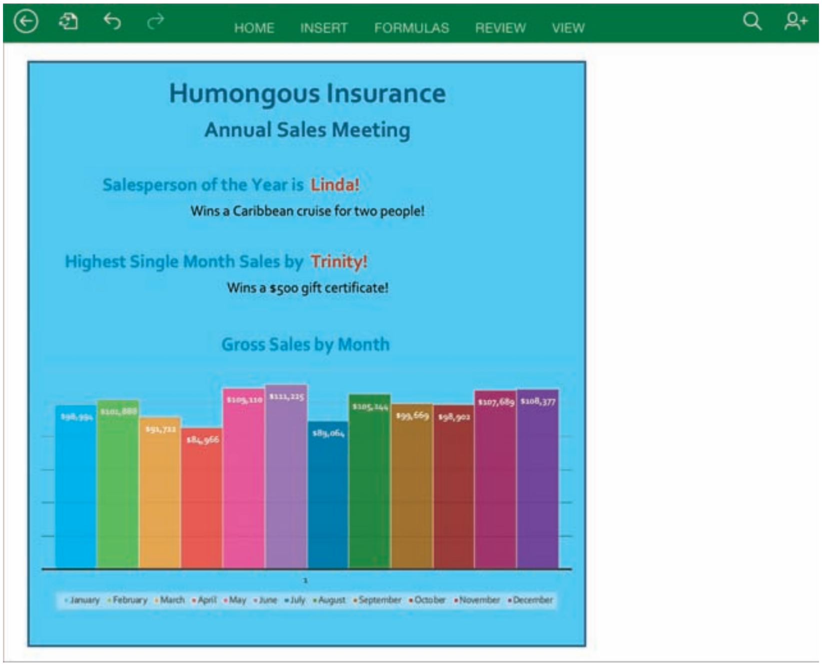
1. Tap the active worksheet tab.
2. On the shortcut bar, tap **Unhide** to display a list of the hidden worksheets in the workbook.
3. In the list, tap the name of the worksheet that you want to unhide.

Show and hide worksheet elements

Data stored in an Excel worksheet is organized in columns and rows. The junction of each column and row is a cell, and this is where you enter data.

An empty worksheet resembles a piece of graph paper, with each cell outlined so you can easily locate it. Lettered headings across the top of the worksheet identify specific columns, and numbered headings down the left side of the worksheet identify specific rows. Worksheet tabs at the bottom of the window identify worksheets within the workbook.

You can hide all these user interface elements to display more of a worksheet or to focus on the worksheet content. You can also hide the Formula Bar when it isn't required, so that it appears only temporarily while you edit cell content.


HOME
INSERT
FORMULAS
REVIEW
VIEW
$98,994
$101,888
$91,722
$84,966
$105,110
$111,225
$89,064
$105,144
$99,669
$98,902
$107,689
$108,377
1
January
February
March
April
May
June
July
August
September
October
November
December

Humongous Insurance

Annual Sales Meeting

Salesperson of the Year is Linda!

Wins a Caribbean cruise for two people!

Highest Single Month Sales by Trinity!

Wins a $500 gift certificate!

Gross Sales by Month

A summary sheet displays information based on the data on other worksheets

Hiding the Formula Bar or worksheet tabs affects all the worksheets in a workbook. Hiding the gridlines or headings affects only the active worksheet. Excel preserves the gridline and heading settings, so if you exit and reopen a workbook the gridlines and headings on each worksheet will be as you left them.

To hide Excel user interface elements

1. On the **View** tab, tap the **Formula Bar**, **Gridlines**, **Headings**, or **Sheet Tabs** slider to change its background to white.

To temporarily display the Formula Bar

1. Double-tap a worksheet cell to activate it for editing.

To permanently redisplay Excel user interface elements

1. On the **View** tab, tap the **Formula Bar, Gridlines**, **Headings**, or **Sheet Tabs** slider to change its background to green.

✓ **TIP** Exiting and reopening a workbook redisplays the Formula Bar and worksheet tabs if they've been hidden.

Enter and edit data on worksheets

Excel for iPad has a Ready mode and an Edit mode. When you're working with the structural aspects of cells, Excel is in Ready mode and the active cell or cell range has selection handles. When you're working with cell content, Excel is in Edit mode and there are no selection handles.

When you enter Edit mode, the Formula Bar opens above the worksheet, and the on-screen keyboard opens below the worksheet. This compresses the workspace significantly. You can orient your iPad horizontally to display more columns or vertically to display more rows.

✓ **TIP** If your iPad is connected to an external keyboard, the on-screen keyboard doesn't open in Edit mode. You can perform many operations by using keyboard shortcuts on an external keyboard. For a complete list of keyboard shortcuts, see the Appendix, "Touchscreen and keyboard shortcuts."

When Excel is in Edit mode, you can select individual cells, columns, or rows, but you can't expand the selection directly on the iPad. (You can do so from a connected external keyboard.) Selecting a column or row activates the first cell in the column or row for editing.

Select cells, columns, and rows

A key step in the process of entering, modifying, or formatting worksheet content is selecting the cell or cells you want to work with. You can use these selection methods in the Excel for iPad touch interface:

- To select a cell, tap it once.

  TIP Selecting a cell or range of cells displays selection handles in the upper-left and lower-right corners of the selection and a related statistic on the status bar. For more information, see the sidebar "Quickly display statistics" in Chapter 8, "Process and present numeric data."

- To select a range of cells, select the upper-left cell in the range, and then drag the lower-right handle to the lower-right cell of the range or flick the handle down or to the right to select all populated cells in that direction (from the current cell to the next blank cell).
- To select a column, tap the column heading (the colored block above the worksheet that is labeled with a letter). Selecting a column displays selection handles on the left and right sides of the column and the content of the first visible cell of the column in the Formula Bar.
- To select a row, tap the row heading (the colored block to the left of the worksheet that is labeled with a number). Selecting a row displays selection handles on the top and bottom of the row and the content of the first visible cell of the row in the Formula Bar.

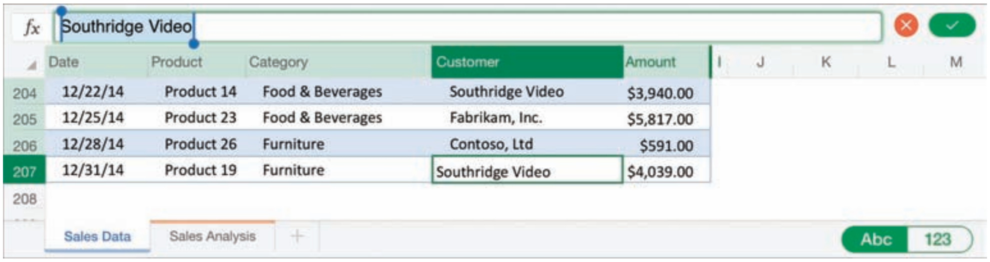
  TIP Selecting a column or row displays a shortcut bar of relevant commands. To close the shortcut bar and maintain the selection, tap an empty area of the ribbon.

- To select multiple columns or rows, select one column or row and then drag the handles to select adjacent columns or rows.

  TIP When an Excel table is active, tapping the column or row heading might select only the corresponding column or row of the table.

- To select an entire worksheet, tap the Select All button, which is located at the junction of the column headings and row headings and is labeled with a triangle that points toward the worksheet.

When you enter Edit mode from a cell that already contains content, or switch to a cell that contains content while you're in Edit mode, Excel displays and selects the cell content in the Formula Bar.



fx Southridge Video

	Date	Product	Category	Customer	Amount
204	12/22/14	Product 14	Food & Beverages	Southridge Video	$3,940.00
205	12/25/14	Product 23	Food & Beverages	Fabrikam, Inc.	$5,817.00
206	12/28/14	Product 26	Furniture	Contoso, Ltd	$591.00
207	12/31/14	Product 19	Furniture	Southridge Video	$4,039.00
208					

The content of the active cell shifts to the far left when Excel is in Edit mode

TIP It's easy to forget that you're in Edit mode. If you can't select cells, columns, or rows in the worksheet, check the Formula Bar for the telltale Cancel and Finish buttons.

In Excel for iPad, you enter and edit all text in the Formula Bar. The cell immediately displays the text, but the cursor is never active in the cell as it is in the desktop versions of Excel. In addition to the standard letters and numbers, you can enter the special characters that are available from the standard, number, and function online keyboards. Most notably, you can insert a line break within text to manually wrap cell content in a specific location.

If the data you want to enter follows a specific pattern such as 5, 10, 15, 20 or Monday, Tuesday, Wednesday, Thursday, you can establish the pattern and then have Excel continue the pattern and fill in the rest of the cells for you.

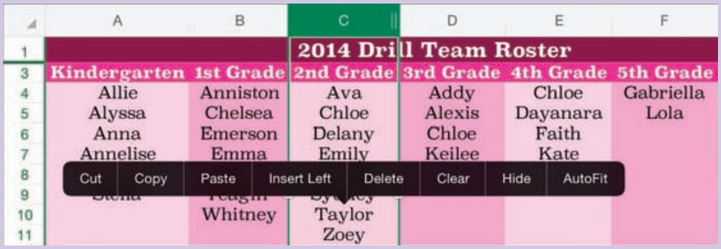
If the data you want to store in a worksheet already exists in another location, you can copy it from the source and paste it into the worksheet. This avoids the errors that can occur when entering data manually. The process of pasting content in Excel is the same as in other Office for iPad apps. If you paste a table into a worksheet, the table cells will map to the worksheet cells so that the table retains its structure.

TIP You can locate information within a workbook by searching for values, formula elements, or named objects. For information about searching Excel workbooks, see "Search file content" in Chapter 3, "Create and manage files."

Display and hide the shortcut bar

Regardless of your experience with Excel, it can take some practice to master the techniques for selecting and manipulating content by touch on an iPad rather than by using a mouse. When you are working with content in Excel for iPad, the shortcut bar can be very convenient because it provides access to the most frequently used commands for a selected entity. It can also be inconvenient because sometimes it opens on top of content or tools that you want to work with.

Tapping a cell and then tapping it again displays the shortcut bar for the cell. (This action of tapping twice isn't the same as double-tapping; it's slower and has a different result.) Tapping a column or row heading once selects the column or row and also displays the shortcut bar.



	A	B	C	D	E	F
1			2014 Drill Team Roster			
3	Kindergarten	1st Grade	2nd Grade	3rd Grade	4th Grade	5th Grade
4	Allie	Anniston	Ava	Addy	Chloe	Gabriella
5	Alyssa	Chelsea	Chloe	Alexis	Dayanara	Lola
6	Anna	Emerson	Delany	Chloe	Faith	
7	Annelise	Emma	Emily	Keilee	Kate	
9	[illegible]	[illegible]	[illegible]			
10		Whitney	Taylor			
11			Zoey			

You can perform most common tasks from the context-specific shortcut bar

You can hide the shortcut bar and still maintain the selection by tapping a colored part of the ribbon.

IMPORTANT You perform many tasks in Word for iPad, Excel for iPad, and PowerPoint for iPad by using the same processes. Common processes include those for giving commands in the Office user interface and for opening, saving, searching, and distributing files. For more information, see Chapter 3, "Create and manage files."

To switch from Ready mode to Edit mode

1. Do any of the following:
    - Double-tap a cell.
    - Select a cell and then tap the Formula Bar.
    - Begin typing on a connected external keyboard.
    - Press **Ctrl+2** on a connected external keyboard.

To switch from Edit mode to Ready mode

1. Do any of the following:
    - To complete the edit and move to the next cell, tap the **Return** key on the on-screen keyboard or press the **Enter** key on a connected external keyboard.
    - To complete the edit and stay in the current cell, tap the **Finish** button (labeled with a check mark) at the right end of the Formula Bar or the **Keyboard** key on the on-screen keyboard.
    - To complete the edit and expand the selection, hold down the **Shift** key and press an arrow key.
    - To discard the edit, tap the **Cancel** button (labeled with an X) at the right end of the Formula Bar.

To enter or edit cell content

1. Switch to Edit mode, and then enter text from the on-screen keyboard.

    Or

    From Ready mode or Edit mode, enter text from a connected external keyboard.

To insert a line break in cell content

1. In Edit mode, position the cursor where you want the line break.
2. In the upper-right corner of the on-screen keyboard, tap the **Function** button (labeled **123**) to display the function keyboard.

    SEE ALSO For more information about the function keyboard, see "Perform data-processing operations" in Chapter 8, "Process and present numeric data."

3. On the function keyboard, press and hold the **Return** key (labeled with a curved arrow) to display the **Line Break** key, and then slide your finger to the **Line Break** key.

> **TIP** The Line Break key and other hidden keys are visible only until you lift your finger from the screen. For more information about hidden keys, see "Perform data-processing operations" in Chapter 8, "Process and present numeric data."

To move the content of one or more cells

1. Select the cell or cells.
2. Tap and hold the selection until an animated dotted line outlines the selection. Then without lifting your finger, drag the selected content to the new location.

To fill cells with data that matches a pattern

1. In Edit mode, enter the first two items of the data series into adjacent cells.
2. Switch to Ready mode.
3. Tap the first cell and then drag the selection handle to select the second cell.
4. Tap the selection to display the shortcut bar.
5. On the shortcut bar, tap **Fill**. Note the arrows that appear on the right and bottom sides of the selected cell.
6. Drag the right-pointing arrow to the right to fill the series over, or drag the downward-pointing arrow down to fill the series down.

> **TIP** You can automatically fill series containing days of the week, months of the year, numbers, text, dates, times, and more.

To delete cell content

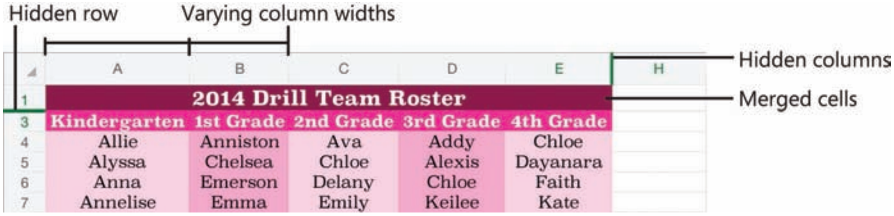
1. Select the range of cells you want to clear.
2. On the shortcut bar, tap **Clear**.

   Or

   On the on-screen keyboard or a connected external keyboard, tap or press the **Delete** key.

Modify columns and rows

A new worksheet has columns of equal width and rows of equal height. A standard letter-size printed page displays approximately 9 columns and 47 rows at the default sizes. The number of columns and rows visible on screen varies based on the dimensions and resolution of your screen. The content that you enter in a worksheet will rarely fit perfectly in the default structure, especially if you're entering text content.



	A	B	C	D	E	H
1	2014 Drill Team Roster					
3	Kindergarten	1st Grade	2nd Grade	3rd Grade	4th Grade	
4	Allie	Anniston	Ava	Addy	Chloe	
5	Alyssa	Chelsea	Chloe	Alexis	Dayanara	
6	Anna	Emerson	Delany	Chloe	Faith	
7	Annelise	Emma	Emily	Keilee	Kate	

You can vary the size and visibility of columns and rows to suit your data

Resize columns and rows

After you enter data in a worksheet, you can easily modify the structure of the worksheet to fit the content. You can change the size of columns and rows so their content is visible on screen and when printed. You can change the width of a column or height of a row manually or by using the AutoFit feature to size the column or row to fit its contents.

TIP You can't display or set the specific column width or row height measurements in Excel for iPad; you can adjust them only by dragging or by using the AutoFit feature.

To fit a column or row to its contents

1. Double-tap the column or row heading.

   Or

   Select the column or row, and then tap **AutoFit** on the shortcut bar.

To change the width of a column

1. Select the column. Notice the handle that appears on the right side of the column heading.
2. Drag the handle to the left to make the column narrower or to the right to make the column wider.

To change the height of a row

1. Select the row. Notice the handle that appears below the row heading.
2. Drag the handle upward to make the row shorter or downward to make the row taller.

Insert and delete columns and rows

After you populate a data range or table, you can easily insert additional columns or rows into the range or table without overwriting existing data; existing columns shift to the right and rows shift down. Excel automatically updates any references in the workbook to the cells that shift to accommodate the insertion.

> **SEE ALSO** For information about referencing cells and cell ranges, see “Perform data-processing operations” in Chapter 8, “Process and present numeric data.”

You can specify the insertion location for columns or rows, or the columns or rows you want to delete, by selecting them, or by selecting only representative cells.

If a column or row containing the data you want to insert already exists, you can move that column or row to a different location or copy it to another location. When you delete columns or rows, Excel shifts the remaining content to fill the gap and updates any cell references in the workbook to reflect the change.

> **TIP** Note the difference between *deleting* and *clearing* cells. When you delete a cell, it is completely removed from the worksheet, and other cells move to replace it. When you clear a cell, the content of the cell is deleted, but the cell structure remains in place.

To insert a blank column

1. Select the column, or any cell in the column, that is in the position where you want to insert the blank column.

   > **TIP** If you want to insert multiple columns in one location, drag the selection handle to the right to select the number of columns you want to insert.

2. On the shortcut bar, tap **Insert Left**.

   Or

   On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Insert Sheet Columns**.

To move or copy a column to another location

1. Select the column you want to move or copy.

> **TIP** If you want to move or copy multiple contiguous columns, drag the selection handles to select the adjacent columns.

2. On the shortcut bar, do one of the following:
   - If you want to move the selected column, tap **Cut**.
   - If you want to duplicate the selected column, tap **Copy**.
3. Select the column that is in the position where you want to place the column.
4. On the shortcut bar, tap **Insert Left**.

   Or

   On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Insert Sheet Columns**.

To insert a blank row

1. Select the row, or any cell in the row, that is in the position where you want to insert the blank row.

> **TIP** If you want to insert multiple rows in the same location, drag the selection handle down to select the same number of rows that you want to insert.

2. On the shortcut bar, tap **Insert Above**.

   Or

   On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Insert Sheet Rows**.

To move or copy a row to another location

1. Select the row you want to move or copy.

> ✓ **TIP** If you want to move or copy multiple contiguous rows, drag the selection handles to select the adjacent rows.

2. On the shortcut bar, do one of the following:
   - If you want to move the selected row, tap **Cut**.
   - If you want to duplicate the selected row, tap **Copy**.
3. Select the row that is in the position where you want to place the cut or copied rows.
4. On the shortcut bar, tap **Insert Above**.

   Or

   On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Insert Sheet Rows**.

To delete a column

1. Select the column, or any cell in the column, that you want to delete.

> ✓ **TIP** If you want to delete multiple contiguous columns, drag the selection handles to select the adjacent columns or cells.

2. On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Delete Sheet Columns**.

To delete a row

1. Select the row, or any cell in the row, that you want to delete.

> ✓ **TIP** If you want to delete multiple contiguous rows, drag the selection handles to select the adjacent rows or cells.

2. On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Delete Sheet Rows**.

Hide and unhide columns and rows

If a data range includes a column or row of information that you either don't want to display or don't want to include in a chart, but that you don't want to delete, you can hide it instead. The headings of a hidden column or row don't change, so you can identify locations of hidden columns and rows by the missing headings and the thick lines that replace them.

> ⚠ **IMPORTANT** You can't hide columns or rows of Excel tables when you are working with a workbook in Excel for iPad. If you need to hide a table column or row, you can convert the table to a data range, hide the column or row, and then convert the data range to a table. For more information about Excel tables, see "Create and manage Excel tables" in Chapter 8, "Process and present numeric data."

To hide a column or row

1. Tap the heading of the column or row you want to hide.

   > ✓ **TIP** If you want to hide multiple contiguous columns or rows, drag the selection handles to select the adjacent columns or rows.

2. On the shortcut bar, tap **Hide**.

To unhide a hidden column or row

1. Tap the column heading to the left of the hidden column, then drag the right selection handle to the right to select the next visible column.

   Or

   Tap the row heading above the hidden row, then drag the lower selection handle down to select the next visible row.

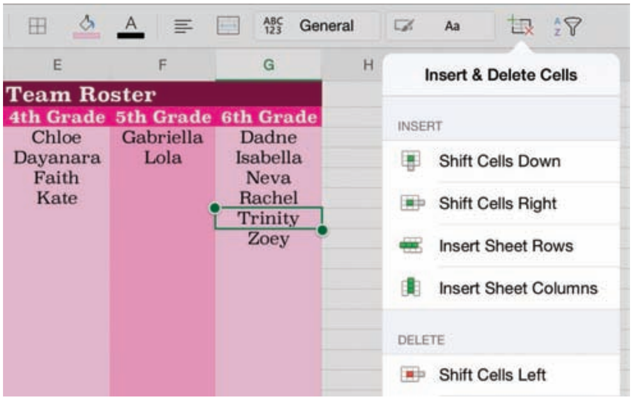
2. On the shortcut bar, tap **Unhide**.

Modify cells and cell content

Sometimes you need to modify the structure of a worksheet on the cell level rather than modifying an entire column or row. For example, you might need to remove only one entry from a column that contains a list of entries. Deleting (clearing) the cell content would leave a gap—you must delete the entire cell to close the gap.

Insert and delete cells

When you insert or delete individual cells from a worksheet, you must stipulate the direction in which Excel should shift the worksheet content that is below and to the right of the cell.


General
Aa
E
F
G
H
Team Roster
4th Grade
5th Grade
6th Grade
Chloe
Dayanara
Faith
Kate
Gabriella
Lola
Dadne
Isabella
Neva
Rachel
Trinity
Zoey
Insert & Delete Cells
INSERT
Shift Cells Down
Shift Cells Right
Insert Sheet Rows
Insert Sheet Columns
DELETE
Shift Cells Left

You choose the direction to shift content when inserting or deleting cells

To insert a blank cell in a populated range

1. Select the cell that is located where you want the blank cell.
2. On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Shift Cells Down** or **Shift Cells Right**, depending on where you want to move the adjacent cells.

To insert multiple cells

1. Select the range of cells that occupy the space in which you want to insert the new blank cells.
2. On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Shift Cells Down** or **Shift Cells Right**, depending on where you want the surrounding cells to be moved.

To delete a cell

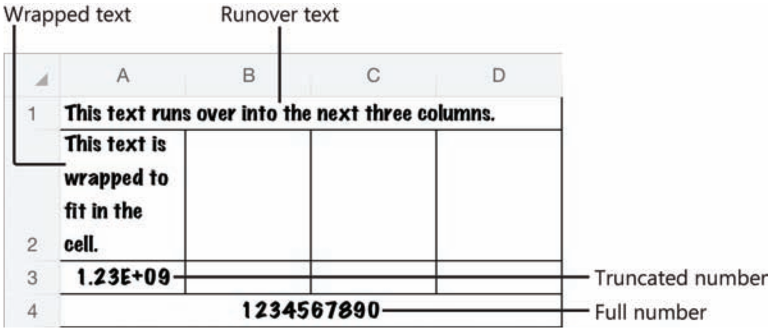
1. Select the cell (or range of cells) that you want to delete.
2. On the **Home** tab, tap the **Insert & Delete Cells** button, and then tap **Shift Cells Left** or **Shift Cells Up**, depending on where you want the surrounding cells to be moved.

Modify cell structure

By default, text content that exceeds the width of its column extends across adjacent columns if they are empty. If the adjacent column contains content, only the text that fits in the first column is visible. If you don't want to resize the column to fit the text, you can wrap the text to display it on multiple lines.

TIP In Excel for iPad, you can wrap the content of a single cell or multiple cells, but not of an entire column.

If a number is too wide to be displayed in a column, Excel displays the result in scientific notation, or displays number signs (#) instead of the number. You can't wrap a long number, but you can widen the column or change the font size to fit the number in the cell.



This text runs over into the next three columns.

This text is wrapped to fit in the cell.

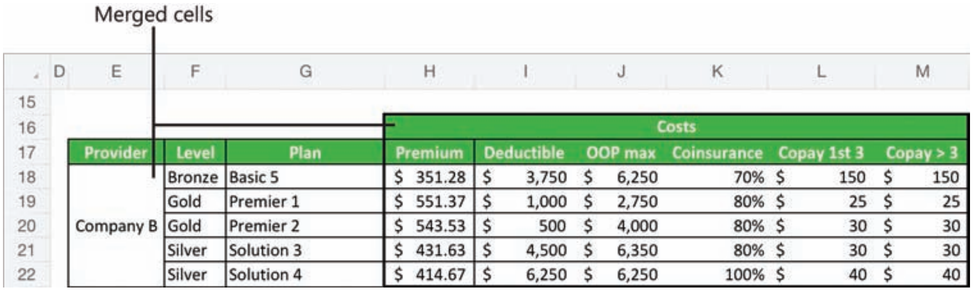
1.23E+09

1234567890

Methods of handling content that exceeds the width of the cell

Sometimes it is appropriate to merge the content of multiple cells into one cell; for example, to indicate that a heading or label applies to multiple columns or rows. A merged cell occupies the space of the original cells.

IMPORTANT When you merge multiple cells, Excel keeps only the data from the upper-left cell, and discards the other values. If the other cells contain data that you want to keep, move the data before merging the cells.



	D	E	F	G	H	I	J	K	L	M
15										
16					Costs					
17		Provider	Level	Plan	Premium	Deductible	OOP max	Coinsurance	Copay 1st 3	Copay > 3
18		Company B	Bronze	Basic 5	$ 351.28	$ 3,750	$ 6,250	70%	$ 150	$ 150
19			Gold	Premier 1	$ 551.37	$ 1,000	$ 2,750	80%	$ 25	$ 25
20			Gold	Premier 2	$ 543.53	$ 500	$ 4,000	80%	$ 30	$ 30
21			Silver	Solution 3	$ 431.63	$ 4,500	$ 6,350	80%	$ 30	$ 30
22			Silver	Solution 4	$ 414.67	$ 6,250	$ 6,250	100%	$ 40	$ 40

You can merge cells vertically, horizontally, or both

TIP Merged cells can interfere with some types of operations on the surrounding columns or rows, such as filling cell data. If this happens, you can unmerge the cells, perform the operation, and then remerge the cells.

To wrap or unwrap text

1. Select the cell you want to format, and then tap the selected cell.

   Or

   Select multiple contiguous cells that you want to format.

2. On the shortcut bar, tap **Wrap** or **Unwrap**.

To merge a range of cells

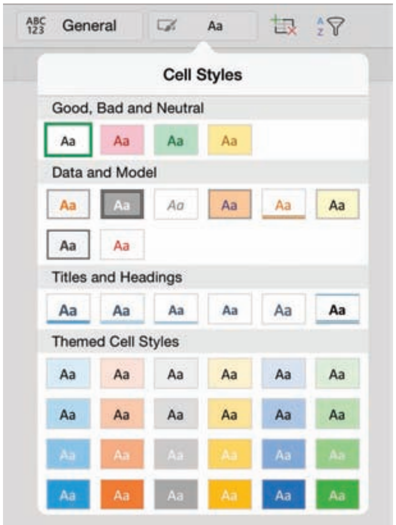
1. Select the cells you want to combine.
2. On the **Home** tab, tap the **Merge & Center** button.

Format cell appearance

You can format worksheet content to help people identify key information. Beyond the standard font formatting options, you can add shading (also called *fill color*) and borders to cells. You can fill cells and apply borders independently or as part of a preset cell style. Some of the cell styles available in Excel are intended to convey specific information and others are linked to the workbook theme.

TIP Conditional formatting is an incredibly useful tool for exposing trends in numeric data. You can't apply or modify conditional formatting rules in Excel for iPad, but you can open worksheets that include conditional formatting rules created in other versions of Excel, and the rules function correctly in Excel for iPad.

All the cell styles are purely decorative. None of the styles that are designated as titles and headings actually affect the structure of the content or link to an outline level, as headings in a Word document do.



You can use cell styles to add visual interest and meaning to a cell

SEE ALSO For information about changing the font, size, color, and style of text, see "Change the appearance of text" in Chapter 4, "Create professional documents."

A workbook can store many types of numeric data, and not all of these numbers should be displayed or processed in the same way. You can format specific types of numbers to display correctly and so that Excel correctly recognizes whether to process the number as a value or as something else (such as a date).

Excel for iPad includes 11 categories of number formats:

- **General** This is the default format for numbers. It permits Excel to process numbers in mathematic operations and to display numbers by using scientific notation if necessary to fit within the cell.
- **Text** This number format instructs Excel to display and process the number exactly as you enter it. It is particularly useful for numbers with leading zeros and long numbers, such as credit card numbers, that Excel would otherwise change to scientific notation.

- **Accounting** This format allows you to display a specific number of decimal places and a currency symbol, which is left-aligned in the cell so the values are easier to read.
- **Currency** This format allows you to display a specific number of decimal places and a currency symbol, which is flush against the numbers. You can also specify the format of negative values.
- **Date** This format allows you to choose from among many standard options for displaying short and long dates to regional standards.
- **Fractions** This format expresses a decimal number as the equivalent fraction. You can specify the denominator or degree of precision up to 1/999.
- **Number** This format allows you to display a specific number of decimal places and specify whether to display the thousands separator and how to format negative numbers.
- **Percentage** This format displays a decimal number as the equivalent percentage followed by the percent symbol. If you want to display more precise percentages, you can specify the number of decimal places.
- **Scientific** This format expresses a number in scientific notation. You can specify the number of decimal places of the expression.
- **Time** This format allows you to choose from among many standard options for displaying times or date/time combinations to regional standards.
- **Special** This category includes region-specific formats for numbers such as ZIP codes, postal codes, phone numbers, and Social Security numbers.

To add, change, or remove cell borders

1. Select the cell or cell range for which you want to format borders.
2. On the **Home** tab, tap the **Cell Borders** button.
3. On the **Cell Borders** menu, do one of the following:
    - To apply a border to only one side of the selection, tap **Bottom Border**, **Top Border**, **Left Border**, or **Right Border**.
    - To apply borders to multiple sides of the selection, tap **All Borders**, **Outside Borders**, or **Thick Box Border**.
    - To remove all cell borders, tap **No Border**.

TIP Additional border styles and customization options are available in the desktop versions of Excel. If a worksheet cell has a border style that is unavailable in Excel for iPad, you can apply the border to other cells by copying the cell and then pasting only the format to the other cells.

To specify or remove a cell background color

1. Select the cell or cell range you want to format.
2. On the **Home** tab, tap the **Fill Color** button.
3. On the **Fill Color** menu, do one of the following:
   - Tap the color you want to apply.
   - Tap **No Fill** to remove any applied color.

TIP The Fill Color dialog box displays six variations of each theme color, 10 standard colors, and a Custom Color link that displays a spectrum you can select a color from.

To apply a preset cell style

1. Select the cell or cell range you want to format.
2. On the **Home** tab, tap the **Cell Styles** button.
3. On the **Cell Styles** menu, tap the style you want to apply.

To specify a number format

1. Select the cell or cell range you want to format.
2. On the **Home** tab, tap the **Number Formatting** button.
3. On the **Number Formatting** menu, do one of the following:
   - To apply the default format for a category, tap the category name.
   - To apply a specific number format, tap the **i** (the information symbol) to the right of the category name. Set the format-specific options, and then tap away from the menu to close it.

TIP You can summarize large amounts of data for analysis by using a PivotTable, and present visual representations of data as charts. For more information about these presentation tools, see Chapter 8, "Process and present numeric data."

Manage the display of data

When a worksheet contains a large amount of data, it can be challenging to review the data, especially on a small screen such as that of the iPad. If you need to keep all the data at hand, you can rotate the iPad to display more columns or more rows at the same magnification; hide headings, worksheet tabs, and other user interface elements to increase the space available for the worksheet; or zoom out to display more content in the app window. You can freeze the column and row labels so they stay visible—and identify the on-screen content—while you flick through the data range.

If you're focusing on specific data, you can hide columns and rows that you don't need to review. To really narrow things down, you can hide data that isn't relevant to your needs by filtering it, and then present different aspects of the data for evaluations by changing the sort order.

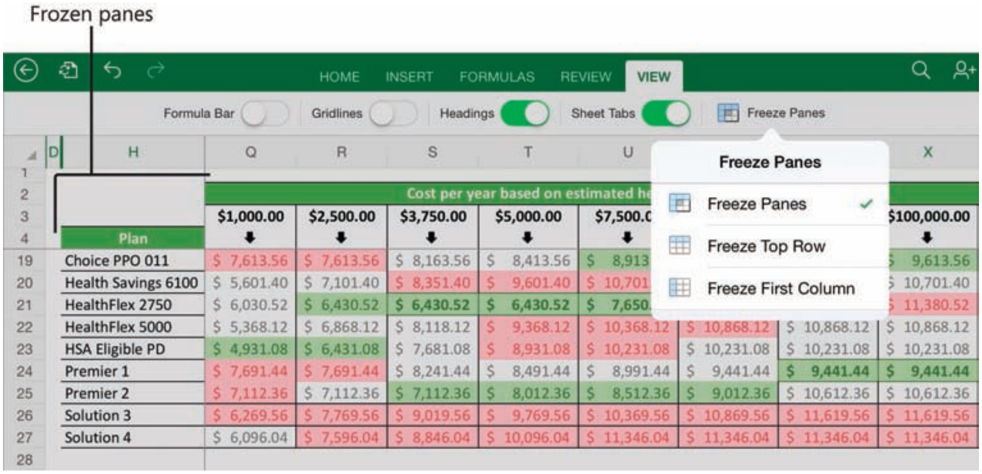
SEE ALSO For information about hiding user interface elements, columns, and rows, see "Create and manage worksheets" and "Modify columns and rows" earlier in this chapter.

Freeze panes

When a worksheet contains more data than you can display on one screen, you must scroll vertically or horizontally to display additional fields and entries. When you scroll a worksheet that contains a data range, the lettered column headings and numbered row headings can help you to identify the visible data, but it's easy to lose track of specific fields or entries. To simplify this process, you can "freeze" the columns and rows that contain labels so they stay in place when you flick through a worksheet.

For a typical data range that starts in the upper-left corner of a worksheet (cell A1), the top row contains the column labels and the first column contains the row labels. Because this is common, Excel provides options to freeze the top row and the first column. Alternatively, you can select the first cell that you want to scroll and then choose the option to freeze the worksheet panes above and to the left of that.

Frozen panes are indicated by thin lines on the worksheet that start between the column headings or row headings. When the display of gridlines is turned off, the lines are visible in the worksheet background.



	D	H	Q	R	S	T	U	V	W	X
1										
2			Cost per year based on estimated he							
3			$1,000.00	$2,500.00	$3,750.00	$5,000.00	$7,500.0			$100,000.00
4		Plan	⬇	⬇	⬇	⬇	⬇			⬇
19		Choice PPO 011	$ 7,613.56	$ 7,613.56	$ 8,163.56	$ 8,413.56	$ 8,913			$ 9,613.56
20		Health Savings 6100	$ 5,601.40	$ 7,101.40	$ 8,351.40	$ 9,601.40	$ 10,701			$ 10,701.40
21		HealthFlex 2750	$ 6,030.52	$ 6,430.52	$ 6,430.52	$ 6,430.52	$ 7,650.			$ 11,380.52
22		HealthFlex 5000	$ 5,368.12	$ 6,868.12	$ 8,118.12	$ 9,368.12	$ 10,368.12	$ 10,868.12	$ 10,868.12	$ 10,868.12
23		HSA Eligible PD	$ 4,931.08	$ 6,431.08	$ 7,681.08	$ 8,931.08	$ 10,231.08	$ 10,231.08	$ 10,231.08	$ 10,231.08
24		Premier 1	$ 7,691.44	$ 7,691.44	$ 8,241.44	$ 8,491.44	$ 8,991.44	$ 9,441.44	$ 9,441.44	$ 9,441.44
25		Premier 2	$ 7,112.36	$ 7,112.36	$ 7,112.36	$ 8,012.36	$ 8,512.36	$ 9,012.36	$ 10,612.36	$ 10,612.36
26		Solution 3	$ 6,269.56	$ 7,769.56	$ 9,019.56	$ 9,769.56	$ 10,369.56	$ 10,869.56	$ 11,619.56	$ 11,619.56
27		Solution 4	$ 6,096.04	$ 7,596.04	$ 8,846.04	$ 10,096.04	$ 11,346.04	$ 11,346.04	$ 11,346.04	$ 11,346.04
28										

You can freeze panes at any location in a worksheet

To freeze the panes to the left of and above a specific cell

1. Position the worksheet so that the rows you want to have visible after you freeze the panes are the first rows in the window.

   ⚠ **IMPORTANT** In Excel for iPad, freezing rows prevents the frozen rows from scrolling, so if you want to have multiple rows visible when scrolling, ensure that they are exposed before you freeze the rows.

2. Select the first cell that you want to scroll (this cell will not be frozen).
3. On the **View** tab, tap **Freeze Panes**. Then on the **Freeze Panes** menu, tap **Freeze Panes**.

To freeze the first visible column

1. Position the worksheet so that the one column you want to freeze as you scroll horizontally is the first column in the window.
2. On the **View** tab, tap **Freeze Panes**. Then on the **Freeze Panes** menu, tap **Freeze First Column**.

To freeze the first visible row

1. Position the worksheet so that the one row you want to freeze as you scroll vertically is the first row in the window.

2. On the **View** tab, tap **Freeze Panes**. Then on the **Freeze Panes** menu, tap **Freeze Top Row**.

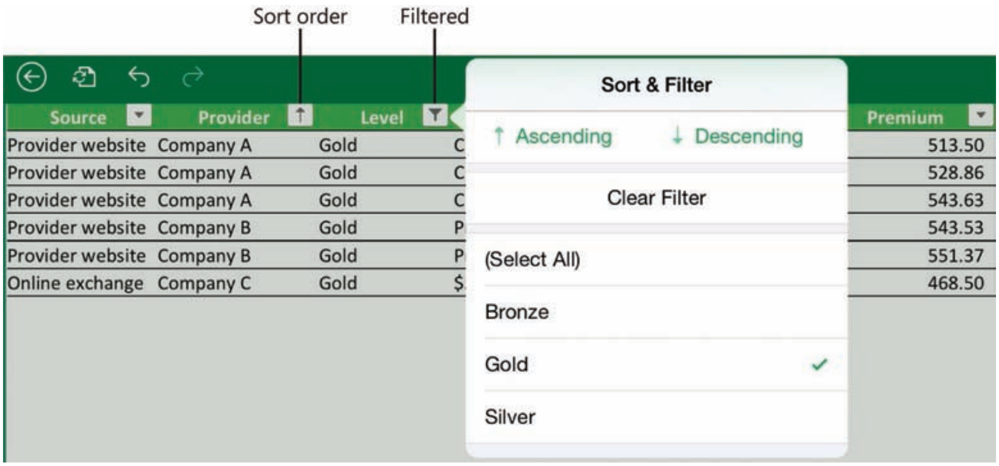
To unfreeze panes

1. On the **View** tab, tap **Freeze Panes**.
2. On the **Freeze Panes** menu, tap the current selection, and then tap a blank area of the ribbon to close the menu.

Sort and filter data

A key feature of Excel is the ability to locate specific data or data that meets specific requirements. You can use the search function to locate specific text or characteristics and then move among the results one by one. For many purposes, however, it's more useful to manipulate the data range to display data in a certain arrangement or to display only (and all) the records that share specific characteristics.

You can sort a data range or Excel table by the entries in any column to present the data in different ways. For example, if you have a list of products offered by different companies at different prices, you can sort the data by company name, by product name, or by price. Then you can narrow down the options by filtering the data to display only (and all) the records that share specific characteristics.



Source	Provider	Level		Premium
Provider website	Company A	Gold	C	513.50
Provider website	Company A	Gold	C	528.86
Provider website	Company A	Gold	C	543.63
Provider website	Company B	Gold	P	543.53
Provider website	Company B	Gold	P	551.37
Online exchange	Company C	Gold	$	468.50

Filtering displays only the rows that contain the selected entry

TIP You can filter a data range by more than one column to display only entries that meet multiple criteria. In Excel for iPad, you can sort a data range by only one column at a time; you can't perform multilevel sorts from the Sort & Filter menu.

Filtering is off by default for data ranges, but you can easily turn it on. When you do, Excel evaluates the data and displays a Sort & Filter button at the right edge of each data column heading. The button label changes to indicate the column status, as follows:

- When a column is neither sorted nor filtered, the button is labeled with a downward-pointing triangle.
- When data is sorted by a specific column, the button is labeled with an arrow that points up to indicate an ascending sort order from smallest to largest (or A to Z) or down to indicate a descending sort order from largest to smallest (or Z to A).
- When the data range is filtered by a specific column, the button is labeled with a funnel-shaped symbol that represents a filter.

Filtering a data range by one or more columns displays the entire entry (row) that matches the filter criteria specified for the columns.

To display the Sort & Filter buttons for a data range

1. Select any cell in the data range.
2. On the **Home** tab, tap the **Sort & Filter** button, and then tap the **Filter** slider to change its background to green.

TIP It isn't necessary to display the Sort & Filter buttons to sort data, but if you're going to perform more than one sort it's convenient to have them there.

To sort a data range by a specific column

1. In the heading of the column that contains the sort criteria, tap the **Sort & Filter** button, and then tap **Ascending** or **Descending**.

Or

1. Select any cell in the column that contains the sort criteria.
2. On the **Home** tab, tap the **Sort & Filter** button.
3. On the **Sort & Filter** menu, tap **Ascending** or **Descending**.

To filter a data range by a specific column entry

1. Display the **Sort & Filter** buttons for the data range.
2. In the heading of the column that contains the filter criteria, tap the **Sort & Filter** button.
3. On the **Sort & Filter** menu, tap to select or clear the selection of values to be displayed.

> **TIP** A check mark indicates the filter values. Tap (Select All) to quickly select or clear the selection of all available values.

To clear a filter

1. In the heading of the column that contains the filter criteria, tap the **Sort & Filter** button.
2. On the **Sort & Filter** menu, tap **Clear Filter**.

Skills review

In this chapter, you learned how to:

- Create workbooks
- Create and manage worksheets
- Enter and edit data on worksheets
- Modify columns and rows
- Modify cells and cell content
- Manage the display of data

Practice tasks

The practice files for these tasks are located in the iPadOfficeSBS\Ch07 folder.

Create workbooks

Start Excel, and then perform the following tasks:

1. Create a blank workbook, and then save the workbook on your iPad as **My Blank Workbook**.
2. Create a new workbook based on the built-in **Movie List** template.
3. Starting in cell C9, add information about your three favorite children's movies to the table. Notice that Excel continues the banded row striping automatically.
4. Save the workbook on your iPad as **My Movie Workbook**.
5. Create a new workbook based on any of the Excel Online templates.
6. After Excel saves the workbook to your OneDrive, open it in Excel for iPad and notice the file name.
7. Save a duplicate copy of the workbook on your iPad as **My Online Workbook**. Then navigate from the **Open** page of the Backstage view to the **Documents** folder on your OneDrive and open the workbook that has the name you identified in step 6.
8. Verify that the open workbook is the one you created from the Office Online website.
9. On the **Open** page of the Backstage view, tap the **File Actions** button next to the workbook name and then follow the process to delete the open workbook from your OneDrive.

Create and manage worksheets

Open the ManageWorksheets workbook, and then perform the following tasks:

1. Review the information on the *Month 1* worksheet.
2. Create a new worksheet after the *Month 2* worksheet. Name the new worksheet **Our Goals**.
3. Insert two copies of the *Month 1* worksheet as the last worksheets in the workbook. Name the worksheets **Month 3** and **Month 4**.
4. Move the *Our Goals* worksheet to the right end of the sheet tab area, and then hide it.
5. On the *Month 1* worksheet, hide the Formula Bar, gridlines, and headings. Then verify that the gridlines and headings are still visible on the other worksheets.
6. Redisplay the hidden worksheet, and then redisplay the Formula Bar.

Enter and edit data on worksheets

Open the EnterData workbook, and then perform the following tasks:

1. Review the information on the *January* worksheet. Then display the *February* worksheet.
2. In cell A9, add a new employee to the schedule by replacing *Employee 5* with the name **Jean**.
3. Without leaving Edit mode, move to cell AG4 and insert a line break immediately before the word *Days*. Then complete the edit and return to Ready mode.
4. Move the content of cells M7:N7 to Q7:R7 so there are only two people out of the office on February 13th.
5. Extend Kathy's vacation for the rest of the week by filling the pattern from Q7:R7 through to cell U7.
6. On the *March* worksheet, update cell A9 to add Jean to the schedule. Schedule an offsite training for Jean on the first weekday of the month by entering a **T** in cell C9 and completing the edit.
7. Cancel two of Susie's vacation days by deleting the content of cells Q5:R5.

Modify columns and rows

Open the ManageStructure workbook, and then perform the following tasks:

1. Manually change the width of column B and the height of row 2 to more closely fit their content. Then use the AutoFit feature to make the column and row exactly the right sizes to fit their content.
2. Insert a new column to the left of column C. Enter **Teacher** in the column header.
3. Insert a copy of column E in columns F and G. Change the new column headers to **Quarter 3** and **Quarter 4**, and then delete the grades from the new columns without clearing the formatting.
4. Move the *Teacher* column so it is between the *Period* and *Class* columns.
5. Insert two new rows above row 5. Enter **Lunch** in B5 and **Recess** in B6.
6. Hide the *Lunch* row. Then unhide the *Lunch* row and hide the *Recess* row instead.

Modify cells and cell content

Open the ManageCells workbook, and then perform the following tasks:

1. Review the *Team Jerseys* worksheet. This worksheet contains a list of team members, the number that appears on the back of each player's uniform shirt, and a space to indicate the person who picked up the shirt from the coach. The entries are split into two sets of columns.
2. Change the number format in columns B and F to display whole numbers (without any decimal places).
3. The numbers printed on the players' shirts are all two digits. Apply a number format that won't remove leading zeros. Then enter a **0** before each number from 1 through 9.
4. Select the three cells that contain information about *Jane*. Insert a set of three cells above Jane's (without deleting Jane's information), and then enter the name **Jaime** in the new *Player Name* cell.

5. Cells E16:G17 contain two entries for the same girl, as evidenced by the matching names and shirt numbers. Delete the three cells in row 16 that contain information for Presley K, and shift the cells upward to fill the gap.
6. In the second set of columns, create space for two new entries in rows 14 and 15, below the entry for *Mallory*. Enter **Marcella** in row 14 and **Mary** in row 15.
7. Format cells C1 and G1 so that the column headings no longer wrap within the cells. Then use the AutoFit feature to size the columns to the minimum width required to fit the text.
8. Merge cells G10:G11, and enter **Lola's mom** in the merged cell to indicate that she picked up both girls' shirts. Then format the cell so its content is left-aligned like those above and below it.
9. Select cells A1:G31, and add a thick border around the outside of the selection.
10. Apply a cell fill color that you like to cells A1:G1. Then remove the fill from cell D1 so only the headings are shaded.

Manage the display of data

Open the DisplayData workbook, and then perform the following tasks:

1. Freeze rows 1 and 2. Then flick down and up through the worksheet to confirm that the two rows remain visible.
2. Freeze column A. Then flick right and left through the worksheet to confirm that the column remains visible.
3. Unfreeze the frozen rows and column, and then move the worksheet up in the app window so that cell A10 is the first cell visible in the upper-left corner of the worksheet. Freeze the panes to the left of and above cell B13, and then move around the worksheet to see the effect.
4. Select any cell in the *Daily Living* data range, and then display the **Sort & Filter** buttons for that data range.
5. Sort the *Home* data in ascending alphabetical order.
6. Filter the *Daily Living* data range to display only data related to child care, dining out, and dog walking.

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Store information in digital notebooks

11

OneNote is a very useful program that you can use to store many types of information and then access that information from any device. OneNote is equally useful for home and business purposes and is available for a wide variety of computer, tablet, and smartphone systems.

After you spend a short time using OneNote for iPad, you'll undoubtedly find it a convenient way to store many types of information, such as task lists, itineraries, frequent flyer accounts, supplier contact information, meeting notes, research findings, technical data, and printouts of contracts, receipts, and other documents you want to archive for future reference.

This chapter guides you through procedures related to creating and opening notebooks, adding sections to notebooks, adding pages to sections, adding content to pages, managing notebook content, and closing notebooks.

In this chapter

- Create, open, and close notebooks
- Configure notebook storage structure
- Add information to notebooks
- Manage pages and sections

Practice files

For this chapter, use the practice files from the iPadOfficeSBS\Ch11 folder. For practice file download instructions, see the Introduction.

The OneNote feature set

OneNote is available for use on many platforms, including Windows, Windows Phone, Mac, iPad, iPhone, Android, and Internet browsers. The Windows version of OneNote has significantly more features than any of the others.

Here is a brief comparison of the features you can use in the iPad, Office Online, and Windows versions of OneNote. More information about all the current versions is available at *www.onenote.com*.

OneNote for iPad features

When using OneNote for iPad, you can perform the following tasks:

- Create notebooks in cloud storage locations.
- Create, rename, and delete sections.
- Change the background colors of individual pages.
- Embed files, PDF printouts, local or photo stream images, Office Lens images, and links in notes.
- Format paragraphs and characters, and apply basic styles.
- Classify notes by applying predefined tags.
- Manage the password protection of notebook sections.
- Move and reorder sections, pages, and subpages.

OneNote for iPad doesn't have any premium features that require an Office 365 subscription.

OneNote Online features

You can use OneNote Online to do the following:

- Move and resize note containers.
- Delete individual sections or entire notebooks.
- Locate edits made by other authors in a shared notebook.

- Display content created or modified by specific authors.
- Change the color of a section, which affects the section tab and page navigator background.
- Play audio and video recordings that were embedded in notes by using a desktop version of OneNote.

For more information about OneNote Online, visit *technet.microsoft.com/en-us/library/onenote-online-service-description.aspx*.

OneNote for Windows features

The Windows version of OneNote has the most functionality. You can use OneNote 2013 on a computer running Windows to do the following:

- Change the color of a notebook, which affects the notebook cover.
- Change the display name of the notebook. This doesn't change the name of the folder that contains the notebook content.
- Create and delete section groups.
- Create pages based on content-driven or artistic templates.
- Merge note containers, and select full notebook pages.
- Edit embedded files from within OneNote.
- Integrate tagged tasks with your Outlook task list, and send content from Outlook to OneNote.
- Record and embed audio and video recordings directly on a page, and coordinate the playback of recordings with your written notes.
- Capture and insert screen clips from within OneNote.
- Search notes by tag, by author, or by date, and search the content of audio recordings and the text in images.
- Generate a summary of tagged notes by storage location or date.
- Insert mathematical equations into notes.
- Draw or handwrite notes (by using your finger or a stylus).

Create, open, and close notebooks

OneNote stores information in files that are referred to as *notebooks*. You can store all your information in one notebook or create multiple notebooks for different purposes. For example, you could store general business information in one notebook, sensitive business information in a second notebook, and personal information in a third notebook.

In some versions of OneNote, you can create and work with notebooks that are stored locally on your computer or remotely in a connected storage location such as a OneDrive site or SharePoint site. In OneNote for iPad, you can work only with notebooks that are stored remotely.

Create notebooks

When creating a notebook in OneNote for iPad, you must create it on a OneDrive site or SharePoint site. A benefit of creating a notebook in one of these remote storage locations is that you can get to the information from any location or device. If you want to share some or all of the information in your notebook with other people, you can do that, too.

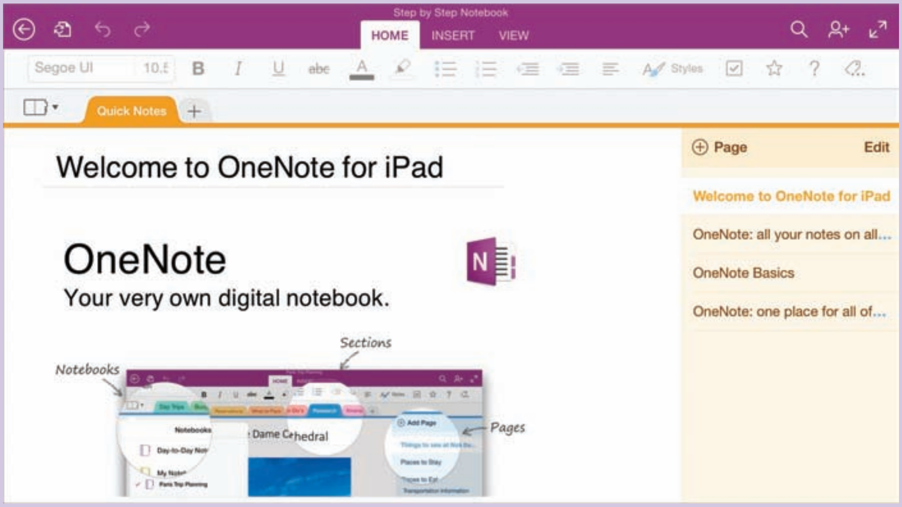
To create a notebook

1. Start OneNote and display the Backstage view.
2. On the **File** bar, tap **Notebooks**.
3. On the **Notebooks** page of the Backstage view, tap **Create Notebook**.
4. In the **Create Notebook** box, enter a name for the new notebook in the **Name** box.
5. If the **Location** box doesn't display the storage location you want to use, tap the box. Then on the **Location** page that appears, tap the storage location you want.
6. In the **Create Notebook** box, tap the **Create** button to create and open a notebook that has the basic storage structure as a starting point.

SEE ALSO For information about creating and configuring structural elements of a notebook, see "Configure notebook storage structure" later in this chapter.

OneNote gets you started

The first time you start OneNote for iPad, the app creates a notebook for you on the OneDrive site that is associated with your user account. This notebook includes a built-in section named *Quick Notes* that contains a bit of information about how and why to use OneNote and some sample content.



Welcome to OneNote for iPad

OneNote

Your very own digital notebook.

Welcome to OneNote for iPad
OneNote: all your notes on all...
OneNote Basics
OneNote: one place for all of...

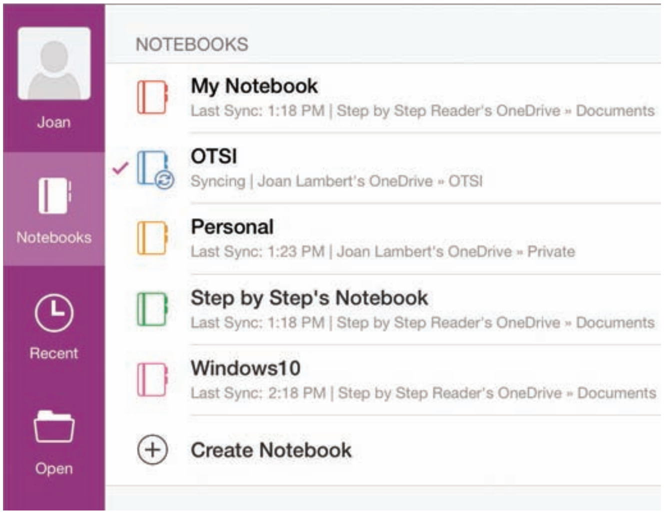
You can retain the Quick Notes section for later reference

Some of the information in the Quick Notes section applies to versions of OneNote other than OneNote for iPad. You can add, remove, and update information in the Quick Notes section if you want to.

Open and switch among notebooks

The first time you open an existing notebook in OneNote for iPad, you must open it from its source location, which can be any storage location you’re connected to. When you open a notebook from a remote storage location, OneNote creates a copy on the device you're working on, and synchronizes the local copy with the server copy. Because of this feature, you can access information that is stored in a notebook even when you're offline, from any device on which you've previously opened the notebook.

If you store or reference information in multiple notebooks, OneNote can maintain active connections to all of them when it's running. You can display the content of only one notebook in the main app window at a time, but all the connected notebooks are "open" and synchronizing content, and you can easily switch among them. The currently open notebooks are shown on the Notebooks page of the Backstage view and the Notebooks menu in the OneNote app window.



My Notebook
Last Sync: 1:18 PM | Step by Step Reader's OneDrive » Documents

OTSI
Syncing | Joan Lambert's OneDrive » OTSI

Personal
Last Sync: 1:23 PM | Joan Lambert's OneDrive » Private

Step by Step's Notebook
Last Sync: 1:18 PM | Step by Step Reader's OneDrive » Documents

Windows10
Last Sync: 2:18 PM | Step by Step Reader's OneDrive » Documents

Open or create notebooks from the Notebooks page of the Backstage view

To open an existing notebook for the first time

1. Start OneNote and display the Backstage view.
2. On the **File** bar, tap **Open** to display the storage locations you're connected to.
3. If the storage location the notebook is stored in doesn't already appear in your Places list, connect to it.

> **SEE ALSO** For information about connecting to storage locations, see "Connect to additional storage locations" in Chapter 2, "Get connected."

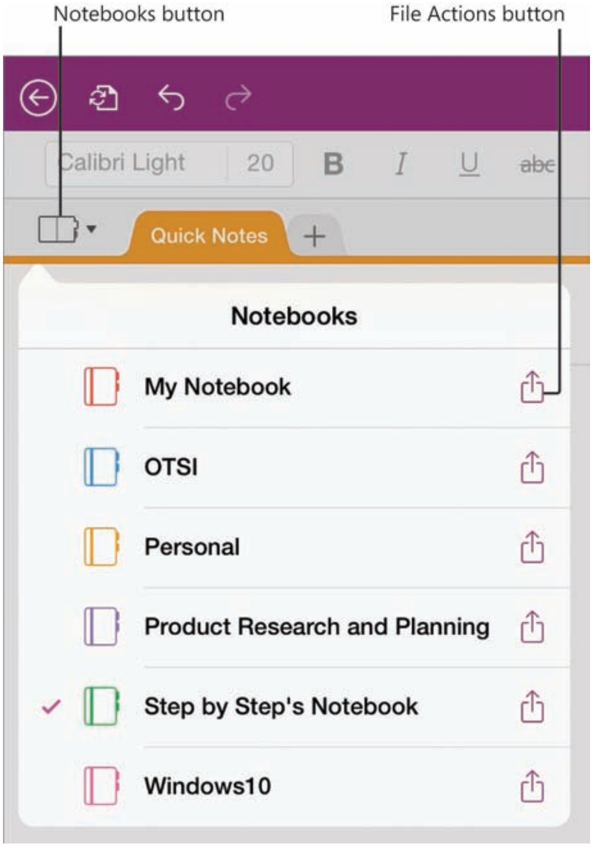
4. Tap the storage location. If necessary, tap through the folder structure until you reach the notebook. Then tap the notebook.
5. If OneNote prompts you to enter user credentials, enter the account name and password for the account that has permission to access the notebook.

To switch to a different open notebook

1. Start OneNote and display the Backstage view.
2. On the **File** bar, tap **Notebooks**.
3. In the list of open notebooks on the **Notebooks** page of the Backstage view, tap the notebook you want to display.

Or

1. With any notebook displayed in OneNote for iPad, tap the **Notebooks** button at the left end of the notebook header to display the currently open notebooks.


Notebooks button
File Actions button
Calibri Light
20
B
I
U
abc
Quick Notes
+
Notebooks
My Notebook
OTSI
Personal
Product Research and Planning
Step by Step's Notebook
Windows10

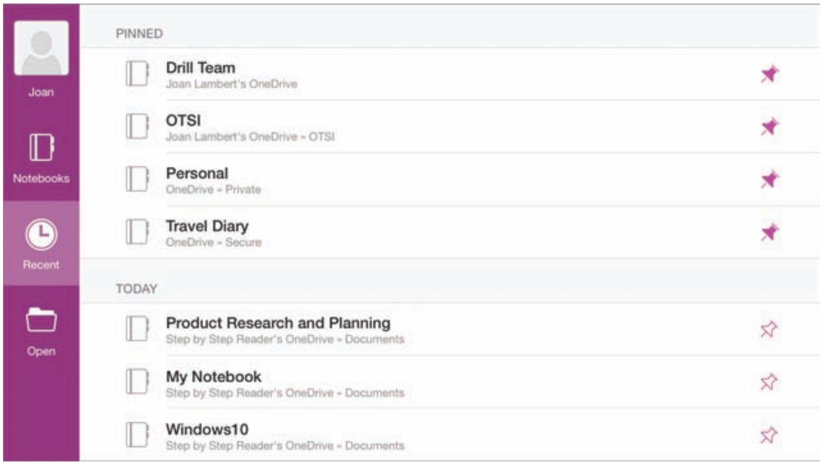
You can manage currently open notebooks from the Notebooks menu

2. On the **Notebooks** menu, tap the notebook you want to display.

Close and reopen notebooks

It isn't necessary to close a notebook before exiting OneNote. It's simplest to leave all the notebooks that you use open all the time so that you can easily search their content. The notebooks will continue to synchronize in the background and you'll have access to current content when you need it. If you no longer need access to the information that is stored in a notebook—for example, if its content pertains only to a completed project—you can close it to keep the Notebooks menu and the Notebooks page of the Backstage view tidy.

After you close a notebook, it remains available to reopen from the Recent page of the Backstage view, or from its original storage location. If you want to ensure that you can quickly access a closed notebook at a later time, you can pin it to the Recent page and it will always be available from the Pinned section at the top of the page.


Joan
Notebooks
Recent
Open
PINNED
Drill Team
Joan Lambert's OneDrive
OTSI
Joan Lambert's OneDrive » OTSI
Personal
OneDrive » Private
Travel Diary
OneDrive » Secure
TODAY
Product Research and Planning
Step by Step Reader's OneDrive » Documents
My Notebook
Step by Step Reader's OneDrive » Documents
Windows10
Step by Step Reader's OneDrive » Documents

Pinned notebooks are convenient to access

To close a notebook

1. On the **Notebooks** page of the Backstage view, tap the **File Actions** button for the notebook you want to close.
2. On the **Notebook Options** menu, tap **Close Notebook**.

Or

1. At the left end of the notebook header, tap the **Notebooks** button.
2. On the **Notebooks** menu, tap the **File Actions** button for the notebook you want to close.
3. On the notebook-specific menu, tap **Close Notebook**.

To reopen a notebook

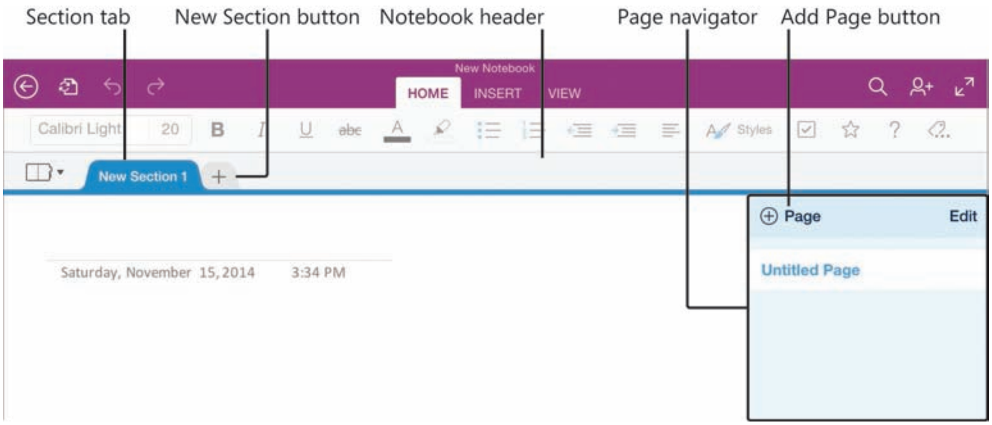
1. On the **Recent** page of the Backstage view, tap the notebook you want to open.

> **SEE ALSO** For information about sharing notebooks and synchronizing notebook content, see "Protect and share information" and "Synchronize notebook content" in Chapter 12, "Locate and share notebook content."

Configure notebook storage structure

The notebook storage structure in OneNote reflects that of a physical tabbed notebook such as those used by students. You can divide notebooks into one or more sections. Each section contains one or more pages. You store information on individual pages.

A new notebook contains one section and one page. You can add sections and pages to provide a structure for the content you intend to store in the notebook.


Section tab
New Section button
Notebook header
Page navigator
Add Page button
New Notebook
HOME
INSERT
VIEW
Calibri Light
20
B
I
U
abc
Styles
New Section 1
+
Page
Edit
Untitled Page
Saturday, November 15, 2014
3:34 PM

The OneNote user interface elements

As you add sections, you can name them in a way that is appropriate for the content. Be sure to give each section a meaningful name so you can easily identify it when you're sending content to OneNote from another program.

> **TIP** In some versions of OneNote, you can optionally group sections into elements called *section groups*, which provide another layer of organizational structure. You can't create section groups in OneNote for iPad, but you can navigate through section groups that already exist in notebooks created in other versions of OneNote.

When you're adding content to a notebook, you can create blank pages or pages that already contain content. If you have a clear idea of the kind of information you're going to store in a notebook, you might find it simplest to build the notebook structure and then add content within that structure. But it isn't necessary to build the structure first—if you prefer, you can send content to your notebook and then organize pages and sections by moving or copying them. Whatever works best for you will work with OneNote.

To create a section

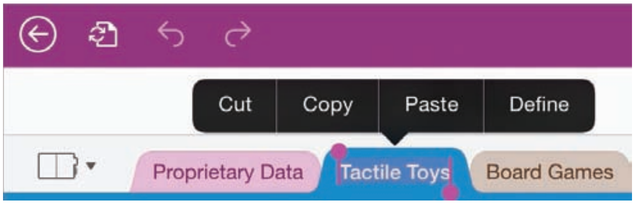
1. In the notebook header, tap the **New Section** button.

To rename a section

1. In the notebook header, double-tap the tab of the section you want to rename.

   Or

   Tap the section tab, and then tap **Rename** to activate the title for editing.

   The shortcut bar displays options for working with the selected title

2. Enter the new section name, and then tap the **Done** key on the on-screen keyboard.

> **TIP** If you're working with an external keyboard connected to your iPad, you can press the Enter key to perform the action of the Done key in any procedure.

To create a page

1. Display the section in which you want to create the page.
2. At the top of the page navigator, tap the **Add Page** button.

To change a page to a subpage

1. At the top of the page navigator, tap the **Edit** button.
2. Tap the selector to the left of the page name.
3. On the action bar at the top of the page navigator, tap the **Demote** button.

> **TIP** To change a subpage to a standard page, follow the same process but tap the Promote button.

To name or rename a page or subpage

1. In the page navigator, tap the page or subpage.
2. In the title area at the top of the page, replace the page title.

Add information to notebooks

You can use OneNote for iPad to create and gather notes in a variety of ways.

Enter and format text

To enter text on a page, you can tap the on-screen keyboard or type on an external keyboard. You can use the dictation functionality of the iPad to dictate notes verbally, which can be a great time-saver after you become accustomed to the process. These processes are the same as those that you use to enter content in a document when using Word for iPad, so you're probably already familiar with them from the Word coverage earlier in this book.

> **SEE ALSO** For information about keyboard and dictation text-entry methods, including keyboard shortcuts and dictation commands, see “Enter text in documents” in Chapter 4, “Create professional documents.”

If you want to keep track of the dates on which you enter specific notes, you can quickly insert the current date on your notebook page in *mm/dd/yy* format by tapping the Date button on the Insert tab. You can reference information that exists on a website rather than recording separate notes about it by linking from a placeholder on the notebook page to the webpage on the Internet.

SEE ALSO For information about inserting hyperlinks to a webpage, see "Reference additional information" in Chapter 6, "Enhance document content."

Formatting options for notebook page content include only the basics:

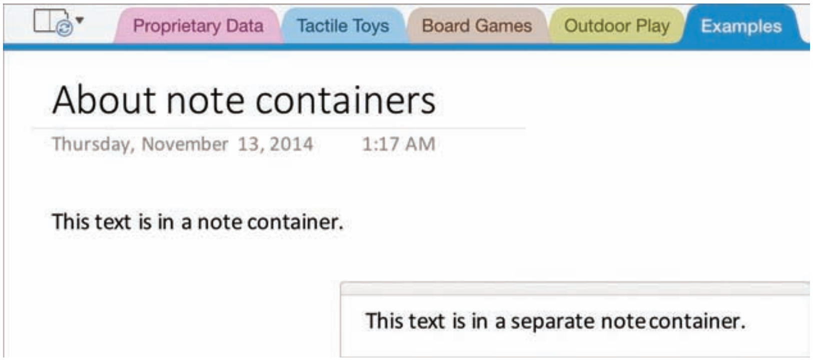
- You can apply a limited number of purpose-specific styles, including styles for a page title, six heading levels, normal paragraphs (the default), citations, quotes, and code.
- You can format characters by applying bold, italic, underline, and strikethrough font styles, changing the font color, and highlighting content.
- You can format paragraphs in these ways:
  - Change the paragraph indent in half-inch increments.
  - Create bulleted lists that use the default bullet characters.
  - Create numbered lists that use the default numbering formats.

The style and formatting options are available from the Home tab of the ribbon. You use the same methods to apply the available styles and formatting to page content in OneNote for iPad that you use in Word for iPad.

SEE ALSO For more information, including step-by-step procedures for applying styles and formatting, see "Align, space, and indent paragraphs" and "Change the appearance of text" in Chapter 4, "Create professional documents," and "Present content in lists" in Chapter 5, "Add visual elements to documents."

Work with notebook containers

When you enter information onto a notebook page, the information is stored inside a note container rather than directly on the page. A page can contain multiple note containers; tapping an empty area of the page that is not in or near an existing note container creates a new one.



About note containers

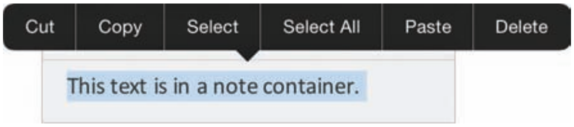
Thursday, November 13, 2014 1:17 AM

This text is in a note container.

This text is in a separate note container.

Two note containers on a page

In OneNote for iPad, it's generally simplest to keep all your page content in one note container because you can't manipulate the containers as you can in OneNote for Windows. Double-tapping the header of a note container selects it and displays a shortcut bar of commands for manipulating the content.



This text is in a note container.

Options for working with a selected note container

IMPORTANT When you select a note container it might appear as though you actually selected the content. You can easily differentiate between the selection of a note container and its content: selecting only the content displays handles, whereas selecting the container does not.

In the Windows version of OneNote, you can move and merge note containers by dragging them on the page. This functionality is not currently available in OneNote for iPad; however, you can move a note container by moving its content.

Like the other Office for iPad apps, OneNote automatically saves the changes you make to a notebook. You can undo all the changes you've made to a Word document, Excel workbook, or PowerPoint presentation in the current app session by restoring the file to its most recently opened state. However, due to the way that OneNote stores information, you can't restore OneNote notebooks. This can be both good and bad—you can enter notes and then exit the notebook without losing them, but you must take care when modifying content that you don't delete information you might need later.

Organize notes in tables

Certain types of information that you store in a notebook will be easier to track if you organize it in tables. OneNote for iPad includes limited table functionality, but it does provide the option of inserting and then populating a table. The initial table created by OneNote for iPad when you insert a blank table is two columns wide by two columns high. You can insert additional rows or columns as necessary. OneNote for iPad doesn't include any special formatting options for tables.

To insert a blank 2-by-2 table

1. On the **Insert** tab, tap the **Table** button.

To add rows or columns to a table

1. To insert a single row or column, tap to position the cursor in a table cell adjacent to where you want to insert the row or column.

   Or

   To insert multiple rows or columns, select the number of existing rows or columns you want to insert adjacent to where you want to insert the new rows or columns.

2. On the **Table** tool tab, tap the **Insert** button.
3. On the **Insert** menu, tap **Rows Above**, **Rows Below**, **Columns Left**, or **Columns Right**.

To remove rows or columns from a table

1. To remove a single row or column, tap to position the cursor anywhere in that row or column.

   Or

   To remove multiple rows or columns, select cells in the rows or columns you want to remove.

2. On the **Table** tool tab, tap the **Delete** button.
3. On the **Delete** menu, tap **Rows** or **Columns**.

To delete a table

1. Tap to position the cursor anywhere in the table.
2. On the **Table** tool tab, tap the **Delete** button.
3. On the **Delete** menu, tap **Table**.

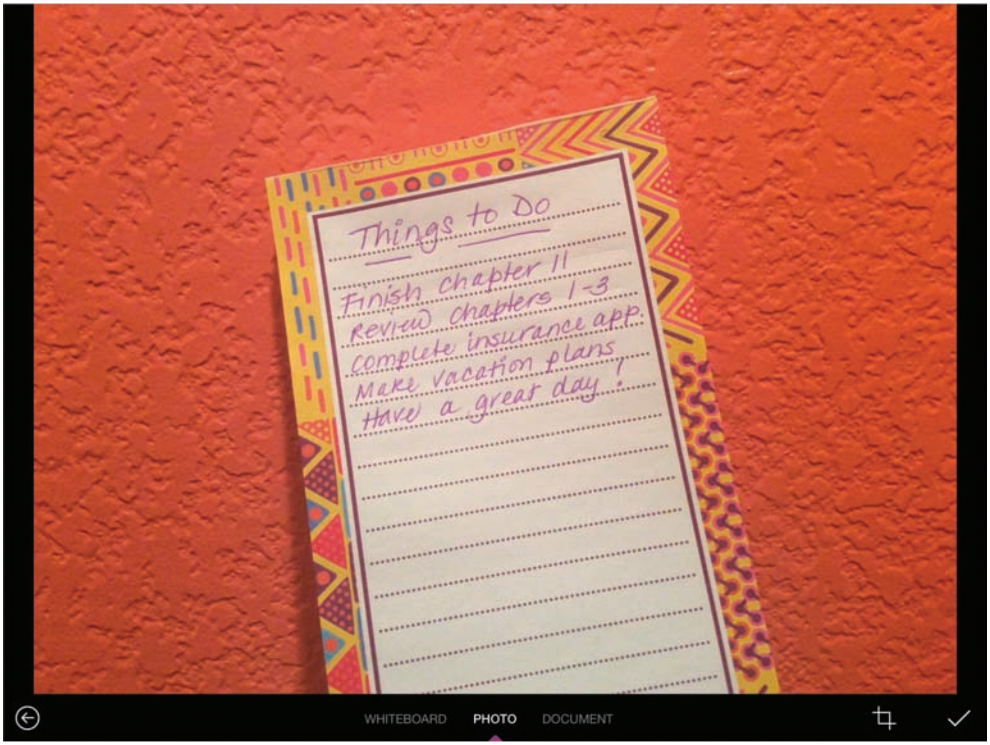
> ✓ **TIP** If you are working with an external keyboard connected to your iPad, you can create a table while inserting information. To do so, enter content and then press the Tab key to move to or create the next cell in the row, and the Return key in the last cell of the table to create a new row.

Insert images

One of the great things about OneNote is that you can store not only your own notes, but also many other types of information. Pictures, of course, are worth a million words—and when you're using OneNote for iPad, you have the advantage of working on a device that you can use to easily capture images at the same time you're taking notes.

You can insert photos that you've already taken with your iPad or another device and stored on your iPad or in your photo stream, or you can capture and insert photos from within OneNote. This simplifies the process of documenting something because you can intersperse pictures among your written notes as appropriate.

Your iPad has its own camera app, but OneNote for iPad also comes with its own picture-management app, Office Lens. Office Lens has been specially engineered to enhance images of text, but you can use it to work with any photo.

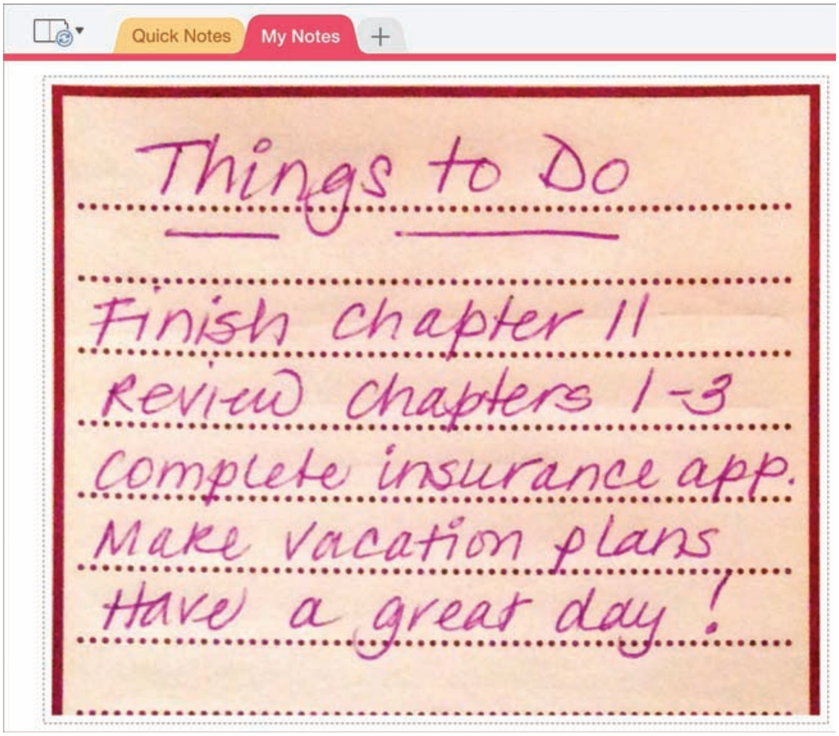


Things to Do
Finish chapter 11
Review chapters 1-3
Complete insurance app.
Make vacation plans
Have a great day!

A photo captured from within OneNote and displayed in Office Lens

When you capture images of whiteboards, printed documents, sticky notes, or other items that display text, Office Lens can enhance the image to make the text content easier to read. You can crop and straighten the image, and when you're happy with the result, Office Lens inserts the enhanced image into your notebook.

TIP If you prefer to use the standard iPad camera app rather than Office Lens, you can turn off Office Lens from the iPad settings for OneNote.



Things to Do

Finish chapter 11
Review chapters 1-3
Complete insurance app.
Make vacation plans
Have a great day!

Office Lens crops, straightens, and sharpens text images

The Office Lens app is simple to use—it includes only four controls.

- The Back button returns to the active notebook page without inserting the photo.
- The Whiteboard, Photo, and Document modes analyze the photo and crop, straighten, and sharpen it to different standards.
- The Crop button displays handles that you can drag to designate the area of the photo you want to keep.
- The Finish button accepts the current settings and inserts the photo on the notebook page.

To select or insert an existing photo from your iPad or photo stream

1. Tap to position the cursor where you want to insert the photo on the page.
2. On the **Insert** tab, tap the **Pictures** button.
3. On the **Photos** menu, tap the storage area that contains the photo you want to insert.
4. Locate the photo and tap it.

   If you're using the default OneNote for iPad camera setting, the photo opens in Office Lens and you can enhance it before you insert it on the page. If you've turned off the option to use Office Lens, the photo appears on the page.

IMPORTANT OneNote for iPad doesn't include picture configuration options such as those that are available in Word and PowerPoint. You can reposition a photo by dragging it but you can't specify the text wrapping or format the photo.

To capture a picture or text image from within OneNote

1. Tap to position the cursor where you want to insert the photo on the page.
2. On the **Insert** tab, tap the **Camera** button.
3. Position the iPad so the image you want to capture is in focus on the screen.
4. Tap the **Capture** button (the circle).

   If you're using the default OneNote for iPad camera setting, the photo opens in Office Lens; otherwise it appears on the page.

To enhance and insert a photo from Office Lens

1. If you want Office Lens to automatically enhance the image content, tap the **Whiteboard** and **Document** buttons to preview the results, and then tap the mode that best fits your needs.
2. If you want to crop or straighten the photo, tap the **Crop** button to display the original image with crop handles positioned where Office Lens senses that the image corners should be.
3. Drag the handles to define the area of the final image and its bottom edge, from which Office Lens calculates the alignment of the image.
4. Tap the **Finish** button to insert the photo.

To turn off Office Lens

1. Start the Settings app.
2. Near the bottom of the **Settings** list, tap **OneNote**.
3. On the **OneNote** page, in the **Photos & Camera section**, tap **Camera Setting**.
4. On the **Camera Setting** page, tap the **Use Office Lens** slider to change its background to white.

Insert files from cloud storage locations

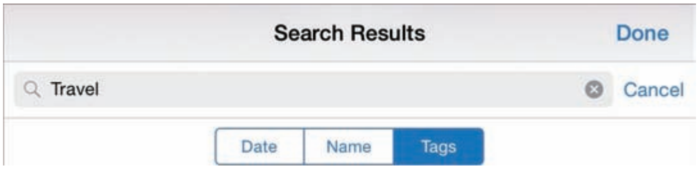
In OneNote for iPad, you can insert files from a cloud storage location into your notes. Different types of files create different results. For example:

- Inserting a Word document displays a labeled document icon on the page. You can display the file content and then open the file for editing.
- Inserting a graphic file displays the graphic on the page.
- Inserting a video file displays a labeled generic icon. You can play the video recording.

You can change the icon label from the file name to something more descriptive, but note that the labels wrap after approximately 13 characters.

IMPORTANT At the time of this writing, OneNote for iPad supports inserting files only from iCloud and Dropbox storage locations.

You can search your cloud storage location for files that contain specific terms. To simplify the process of locating a file in your iCloud storage, you can sort the search results by Date, Name, or Tags.



The sorting options for search results

To insert a file from iCloud or Dropbox storage

1. Tap to position the cursor where you want to insert the file content on the page.
2. On the **Insert** tab, tap **File**.

   A window displays your iCloud storage.
3. If you're inserting a file from iCloud, you can do the following:
   - To switch between the file thumbnail and file list views of your iCloud storage, tap the button that represents the view you want.
   - To search for a specific file, tap the **Search** box and enter the search parameter.
   - To change the sort order of files, tap **Date**, **Name**, or **Tags**.
4. If you want to insert a file from Dropbox, you can do the following:
   - To display your Dropbox storage, tap **Locations** in the upper-left corner of the window, and then tap **Dropbox**.
   - To search for a specific file in the Dropbox window, tap the **Search** box and enter the search parameter.
5. Locate and then tap the file you want to insert.

To change a file icon label

1. Tap the icon, and then on the shortcut bar, tap **Rename**.
2. In the **Rename** box, enter the label you want, and then tap **Save**.

To preview a file from an embedded icon

1. Double-tap the icon.

   Or

   Tap the icon, and then on the shortcut bar, tap **Open**.
2. Flick to scroll through the file.
3. To close the preview, tap **Done** in the upper-left corner of the window.

Send, print, and link content to notes

When you are using the Windows version of OneNote in conjunction with other programs in the Office suite, there are many additional ways you can store information in OneNote for safekeeping. For example, you can:

- Send email messages directly from Outlook to a OneNote notebook.
- Link tagged tasks in a notebook to your Outlook task list.
- Take meeting notes in personal or shared notebooks.
- Create notes that are linked directly to specific locations in a Word document or PowerPoint presentation.
- Print any Office file to a OneNote notebook.

Although you can’t perform these same actions in OneNote for iPad, you can work with the content of notebooks that are stored in shared locations in the iPad and Windows versions of OneNote.

To open a file for editing from a preview window

1. In the upper-right corner of the preview window, tap the **File Actions** button.
2. In the window that opens, tap the icon of the app you want to open the file in.

To manage cloud storage providers

1. On the **Insert** tab, tap the **File** button.
2. In the upper-left corner of the window, tap **Locations**. Then on the **Locations** menu, tap **More**.
3. In the **Manage Storage Providers** window, do either of the following:
   - To make your storage location with a cloud storage provider available, tap the provider's slider to change its background color to green.
   - To remove a cloud storage provider from the **Locations** menu, tap the provider's slider to change its background color to white.
4. In the upper-right corner of the **Manage Storage Providers** window, tap **Done**.

Manage pages and sections

From time to time you might find it necessary to modify the storage structure of a notebook or move content around within the notebook. Fortunately, it's much easier to move information around in an electronic notebook than it is in a physical notebook.

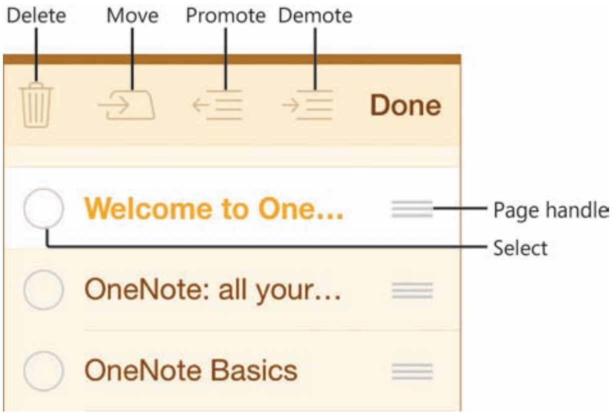
You can rearrange notebook elements in the following ways:

- Move pages within a section, to another section in the same notebook, or to a section in any open notebook.
- Move sections within a notebook or to any other notebook that you have open. When you move a section to a different notebook, it is inserted as the last section in the notebook, and the section tab appears to the right of the other section tabs in the notebook header.

You can also assign background colors to notebook pages to provide a visual indicator of the purpose or status of a page—for example, a green background to indicate that the page content is final or an orange background to indicate that a page contains confidential information.

TIP Changing the page background color in OneNote for iPad doesn't affect the color of the page tab in the page navigator.

You control the movement of pages by activating the edit functions in the page navigator.



Tap Edit at the top of the page navigator to activate the edit functions

After you finish organizing your notebook content, you might find that you have extra or empty notebook elements. You can delete any notebook element other than a section group and the notebook itself from within OneNote for iPad.

TIP You can delete notebooks and section groups when working with a notebook in the Windows version of OneNote.

To change the color of the active page or subpage

1. On the **View** tab, tap the **Page Color** button.
2. On the **Page Color** menu, tap the color swatch you want to apply to the page.

   Or

   On the **Page Color** menu, tap the **No color** button to remove the page background color.

To move a page within a section

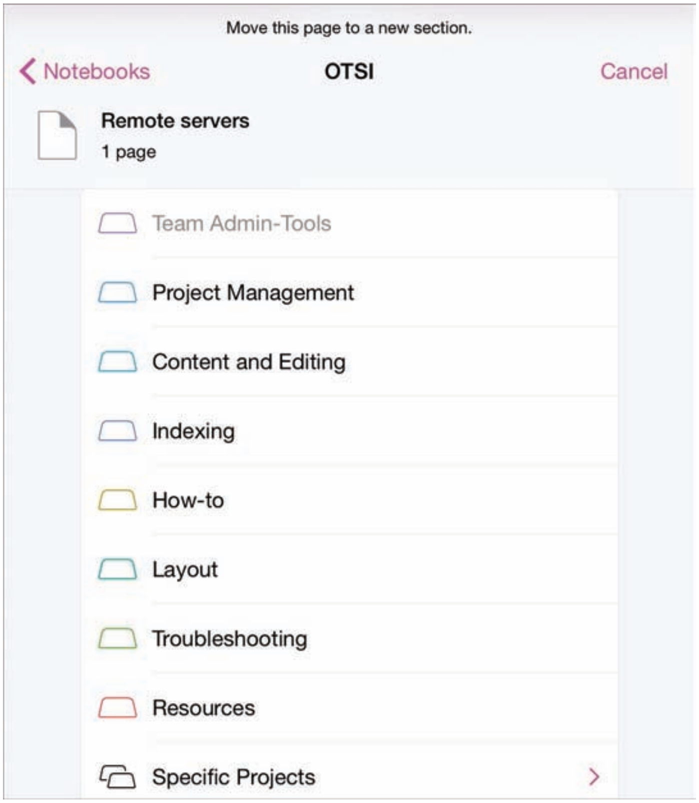
1. At the top of the page navigator, tap **Edit**.
2. In the page navigator, tap and hold the handle of the page you want to move, and then drag it vertically to the new location.

To move one or more pages to a different section or notebook

1. At the top of the page navigator, tap **Edit**.
2. In the page navigator, select the pages you want to move.

   TIP To select a page, tap the empty circle that precedes the page name. A check mark appears when the page is selected.

3. On the action bar at the top of the page navigator, tap the **Move** button to display a window showing the sections and section groups available in the current notebook.


Move this page to a new section.

Notebooks
OTSI
Cancel

Remote servers
1 page

Team Admin-Tools
Project Management
Content and Editing
Indexing
How-to
Layout
Troubleshooting
Resources
Specific Projects

You might need to swipe the list to display all the sections and section groups in the notebook

4. To move the selected pages to a different section of the current notebook, tap the section you want to move them to.

   Or

   To move the pages to a different notebook, tap **Notebooks** to display a window showing the currently open notebooks; tap the notebook, the section group if appropriate, and then the section you want to move the pages to.

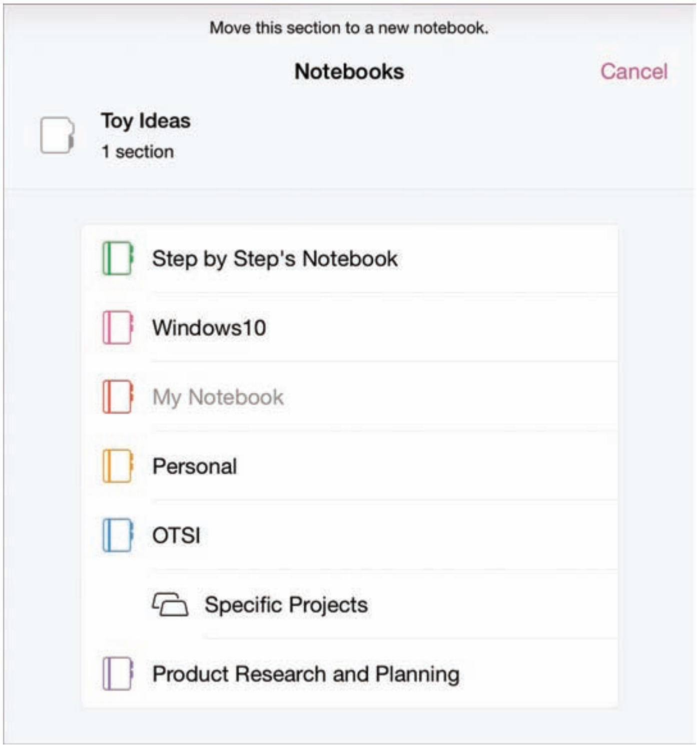
> ✓ **TIP** When you move a page to a different section, it is inserted as the last page in the section, at the bottom of the page navigator for that section. When you move a section to a different notebook, it is inserted as the last section in the notebook, to the right of the existing section tabs in the notebook header.

To move a section within a notebook

1. In the notebook header, tap and hold the tab of the section you want to move, until the tab changes to a lighter color.
2. Drag the section tab laterally to the location you want it in relation to the other section tabs.

To move a section to a different notebook

1. Display the section you want to move.
2. Tap the section tab once.
3. On the shortcut bar, tap **Move** to display a window showing the currently open notebooks and any section groups they contain.


Move this section to a new notebook.

Notebooks
Cancel
Toy Ideas
1 section
Step by Step's Notebook
Windows10
My Notebook
Personal
OTSI
Specific Projects
Product Research and Planning

The section you're moving is identified above the notebook list

4. In the **Notebooks** window, tap the notebook you want to move the section to.

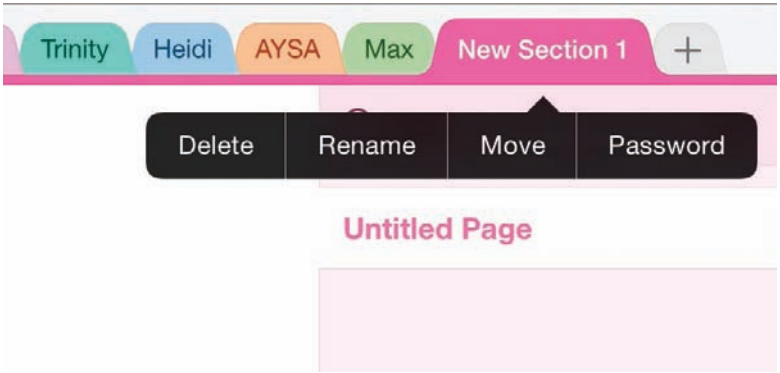
To delete a page

1. Display the section that contains the page you want to delete.
2. In the page navigator, swipe left or right on the tab of the page you want to delete, and then tap **Delete**.

> **IMPORTANT** OneNote stores your deleted pages in the Recycle Bin of the OneDrive site or SharePoint site the notebook is stored on. You can restore deleted pages from that Recycle Bin until they are permanently deleted (usually after 60 days).

To delete a section

1. Display the section you want to delete.
2. In the notebook header, tap the active section tab.



When you tap the tab once, the shortcut bar displays options relevant to the section

> **IMPORTANT** Tap a section tab once to display the shortcut bar, or twice to activate the section tab for editing.

3. On the shortcut bar, tap **Delete**.

Skills review

In this chapter, you learned how to:

- Create, open, and close notebooks
- Configure notebook storage structure
- Add information to notebooks
- Manage pages and sections

Practice tasks

The practice files for these tasks are located in the iPadOfficeSBS\Ch11 folder.

Create, open, and close notebooks and configure storage structure

Start OneNote, and then perform the following tasks:

1. Create a new notebook in your OneDrive storage location and name it **My Notes**.
2. Without closing your new notebook, open the **StoreNotes** notebook from the practice file folder.
3. Close the **StoreNotes** notebook, and then reopen it from the list of recent notebooks.
4. Switch to the **My Notes** notebook.
5. Rename the *Welcome* section as **Practice One**, and create a new section named **Practice Two**. Move the *Practice Two* section so it immediately follows the *Practice One* section.
6. In the *Practice Two* section, rename the untitled page as **Page 1** and create a new page named **Page 2**.
7. Make *Page 2* a subpage of *Page 1*, and rename it as **Subpage One**.
8. Exit OneNote without closing the open notebooks.

Add information to notebooks

Open the StoreNotes notebook if it isn't already open, and then perform the following tasks:

1. In the *Add Content* section, on the *Text Practice* page, enter the following text just below the page title: **Taking notes on the iPad is easy. Keep track of important information, and access it from anywhere.**
2. Tap halfway down the page to create a second note container. In the new note container, insert a 2-by-2 table.

3. In the first column of the table, enter **January** in the first row and **February** in the second row. In the second column, enter **Garnet** in the first row and **Amethyst** in the second row.
4. Add a third row to the end of the table. In the new row, enter **March** in the first column and **Aquamarine** in the second column.
5. Insert a row at the top of the table. In the new row, enter **Month** in the first column and **Birthstone** in the second column. Select the two cells, and then apply bold formatting to the words so they look like column headings.
6. Switch to the *Image Practice* page. From within OneNote, use your iPad and the Office Lens utility to capture an image of something (such as a notepad, whiteboard, or sticky note) that has handwritten text on it.
7. Enhance and crop the image by using Office Lens. Insert the modified image below the title of the *Image Practice* page.
8. Exit OneNote without closing the open notebooks.

Manage pages and sections

Open the StoreNotes notebook if it isn't already open, and open the MoveNotes notebook. Then perform the following tasks:

1. Display the **StoreNotes** notebook.
2. In the *My Pages* section of the notebook, change the color of *Page A* to any shade of blue. Then change the color of *Page B* to any shade of green.
3. Move *Page C* above *Page A*.
4. Move *Page A* and *Page B* to the *Practice Pages* section of the notebook.
5. Move the *Practice Pages* section so that it precedes the *My Pages* section.
6. Move the *Practice Pages* section to the **MoveNotes** notebook. Then create a copy of the *Practice Pages* section in the **StoreNotes** notebook.
7. In the **StoreNotes** notebook, delete the *My Pages* section. Then in the *Practice Pages* section, delete *Page B*.
8. Exit OneNote without closing the open notebooks.

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