Getting Work Done on the Go with Office Mobile

IN THIS CHAPTER

With its Office 2010 family of products, Microsoft has advanced its best-selling office productivity solutions beyond the PC desktop with web-based Office Web Apps as well as a new generation of its Office Mobile, which runs on Windows Phone. The idea is to allow customers to be as productive as possible, no matter where they are, and no matter which devices they're using.

This isn't the first version of Office that Microsoft has released for its smart phone OS, of course. But it is the most full-featured so far. Thanks to a new emphasis on the tasks that make the most sense for mobile devices—note taking, over-the-air connectivity with your workplace's document repositories, and excellent word processing document, spreadsheet, and presentation viewing capabilities, along with basic editing function- ality, Office Mobile is a great companion for any Microsoft Office user.

It also takes advantage of the unique capabilities of today's Windows Phones, with touch and gesture support, integration with the virtual keyboard and its on-the-fly suggestion functionality, and a cool new hub-based interface. So Office Mobile looks and works like an exemplary Windows Phone app.

In this chapter, you'll examine the Office hub, its OneNote Mobile, Word Mobile, Excel Mobile, PowerPoint Mobile, and SharePoint Workspace Mobile components, and how you can access and sync documents via a SharePoint 2010–based document repository. And for those readers using Microsoft's SkyDrive-based Office Web Apps, I'll explain how you can access your cloud-based documents from that service as well, albeit in more limited form.

INTRODUCING THE TINIEST MEMBER OF THE OFFICE FAMILY

Originally dubbed Pocket Office (as in, "Is that an Office in your pocket or are you just happy to see me?"), Microsoft's mobile version of Office debuted a decade ago as part of the Pocket PC platform. Originally, it consisted of Pocket Outlook, Pocket Word, and Pocket Excel, and over the years PowerPoint and OneNote applications were added as well. Eventually, the Pocket moniker was dropped in lieu of the more professional sounding name Office Mobile.
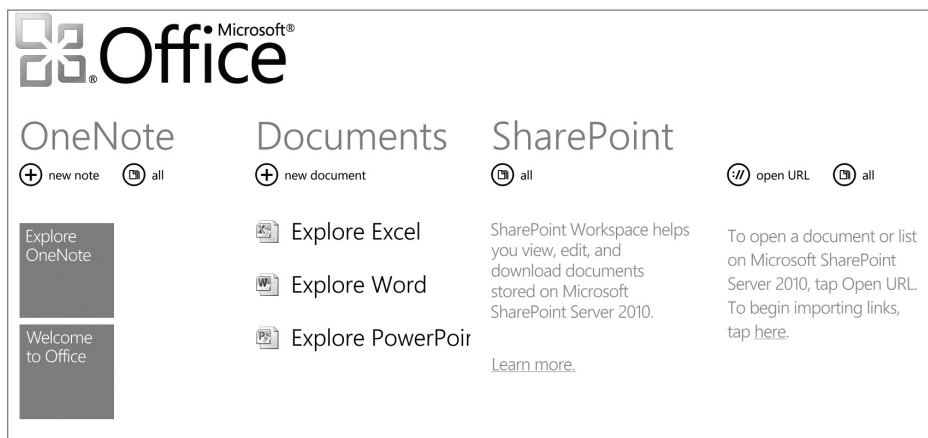
PRODUCT BUNDLING IS OKAY WHEN YOU DON'T HAVE A MONOPOLY

Since the first release, Microsoft has always shipped some version of Office Mobile with each Pocket PC/Windows Mobile/Windows Phone version. Why bundle such applications with its mobile software when it doesn't do so with traditional, PC-based versions of Windows? Likely for two reasons: First, Microsoft has never owned the dominant mobile platform and, thus, hasn't had to worry about antitrust-related product bundling issues. Second, by the time Office did appear on Microsoft's mobile platform, a number of decent office productivity solutions were already available, including DataViz's popular Documents to Go.

Prior to Windows Phone, Office Mobile was delivered as a traditional set of Windows Mobile–type apps, with the exception of Outlook, which was (and still is, in Windows Phone) divided into separate mini-applications for e-mail, calendaring, and contacts management.

> **CROSSREF** I cover e-mail in Chapter 10, calendaring in Chapter 11, and contacts management (via the all-new People hub) in Chapter 4. If you're coming to Windows Phone from a previous Windows Mobile version, these experiences have all changed pretty dramatically. And while the other Office apps described in this chapter should be largely familiar, the way you access them—via the new Office hub—is decidedly Windows Phone–centric as well.

On Windows Phone, Office functionality is provided via a hub, or panoramic experience, that spans across several screens. As you can see in Figure 12-1, when viewed as a single entity, the Office hub is a sweeping, widescreen experience with multiple sections, or columns, each providing its own unique Office related functionality.

FIGURE 12-1: The Office hub, seen as a single panoramic entity.

The Office hub provides the following sections, from left to right:

▶ **OneNote:** Right up front and center, and imbued with new importance as a result, is the OneNote Mobile experience, which provides you with quick access to notes and note-taking functionality.

▶ **Documents:** From here, you can create new Word documents, Excel spreadsheets, and PowerPoint presentations. You can also access existing documents of these kinds that are stored on the phone.

▶ **SharePoint:** If you utilize a SharePoint document repository at your work-place, you can configure your phone to automatically connect to that server so that you can easily view, edit, and work offline with documents between your phone and work.

SKYDRIVE INTEGRATION?

If you're not toiling away in an enterprise sweatshop, you may be surprised to learn that the Office hub doesn't provide a SkyDrive section so you can access your Office Web Apps–based documents in a seamless fashion. I was surprised by this as well, but as you'll see later in the chapter, you can still download, view, and edit SkyDrive-based documents from the Office hub, over the air. It's just not particularly seamless.

WHAT YOU CAN—AND CAN'T—DO WITH OFFICE MOBILE

As you might imagine, given the constrained environs of a typical Windows Phone screen, Office Mobile doesn't provide much competition for the PC-based versions of Office, or even the Office Web Apps for that matter. But it wasn't designed for that purpose. Instead, Microsoft sees Office Mobile as a companion for the Office user on the go, and it's best, I think, to understand this fact and what that means when it comes time to actually use Office Mobile on Windows Phone.

That is, you need to be realistic about the capabilities of this solution and under-stand what it is that it can and cannot do.

What You Can Do

Office Mobile is a great way to view Office documents—and from now on, unless I specify Word documents explicitly, I'm referring to Excel spreadsheets, PowerPoint presentations, and OneNote notes here as well—even rich Office documents, on the go. If all you're looking for is a document reader, Office Mobile is a fantastic solution, and it's compatible with even the very latest document formats used by the PC appli-cations in Office 2010.

Office Mobile is also a decent solution for editing Office documents, even rich Office documents, on the go. One of the issues with this functionality is that Office Mobile

cannot accurately display some of the more complex document layouts supported by modern Office application versions. But as you'll see in a bit, you can generally work around these issues, and it does a great job of retaining underlying formatting even when these elements aren't accurately rendered onscreen. If what you need to do is read a document and make light edits, Office Mobile works quite well.

Office Mobile is a great solution for synchronizing Office documents between your phone and your work-based SharePoint document repositories. It also respects and understands enterprise-oriented Information Rights Management (IRM) technology, which is used to secure documents, electronically, from prying eyes.

If you are a OneNote user—and it's very clear that Microsoft intends to make you one—or just someone who likes to take notes frequently, OneNote Mobile for Windows Phone is a first-class note-taking solution.

> **NOTE** It's worth mentioning, too, that some functionality has been lost since Windows Mobile. You can no longer directly sync device-based notes with notes on your PC, and vice versa. That's because Microsoft has designed Windows Phone to not utilize Windows Mobile Device Center (or any other productivity application) for tethered PC-to-phone sync. But you can still sync notes to the PC indirectly, through Windows Live SkyDrive. I'll show you how later in this chapter.

What You Can't Do

So that's what Office Mobile can do for you. What about its limitations?

Office Mobile is somewhat lacking for those that wish to access SkyDrive-based Office documents and completely lacking if you want to sync them between the Web and your phone.

If you want to create new Word or Excel documents, Office Mobile is a decent solution that lacks only the more complex formatting options that are available on the Web and on the PC. However, if you save these documents externally to the phone, you can later edit them again in Windows or on the Web and add complex new formatting easily enough.

If you want to create new PowerPoint presentations on the go, you're out of luck: You cannot create a new presentation with PowerPoint Mobile. (That said, you could of course create basic, empty presentations and save them to the device as templates for future presentations. It does support Save As.)

USING THE OFFICE HUB

In previous Windows Mobile versions, the available Office Mobile applications were accessed individually. That is, you could find and launch Word Mobile, Excel Mobile, PowerPoint Mobile, or OneNote Mobile (or the Outlook-based e-mail, calendar, and contacts solutions) individually. In Windows Phone, that is no longer the case. In fact, aside from the e-mail, calendar, and contacts solutions built into Windows Phone, there are no individual Office applications outside of the Office hub. So if you want to access any Word, Excel, PowerPoint, OneNote, or SharePoint Workspace functionality on Windows Phone, you'll need to do so through the Office hub.

PINNING THE OFFICE HUB TO YOUR START SCREEN

The Office hub is not pinned to the default Windows Phone Start screen, so if you don't have an Office hub live tile, you may want to add it. To do so, navigate to All Programs (via the right arrow button on the Start screen), locate Office 2010, and then tap and hold. In the pop-up menu that appears, choose Pin to Start. An Office hub live tile will be added to the bottom of the Start screen, and if you wish you can of course move it to any position on the screen.

As noted previously, the Office hub consists of four sections, and provides access to five Office Mobile experiences: OneNote Mobile, Word Mobile, Excel Mobile, Power-Point Mobile, and SharePoint Workspace Mobile. I discuss each of these solutions in turn in the following sections.

Taking Notes, Capturing Ideas, and Syncing with Mobile OneNote

If you're not familiar with Microsoft's excellent note-taking solution, OneNote, then you might be a bit shocked to see that the mobile version of this app is highlighted in the first section, or column, in the Office hub. But that's by design: Microsoft feels that OneNote will one day rank among the most frequently used Office applications (the top two today are Word and Outlook), based on usage trends and rapid uptick with certain demographics, like students. Another part of the strategy of making that happen, of course, involves giving it a key place of honor in the Office hub on Windows Phone.

This makes sense when you consider OneNote's mission: It's an idea processor, if you will; a way to jot down ideas that will later be used in full-fledged documents, such as Word documents or PowerPoint presentations. On the phone, OneNote is a wonderful tool for taking quick notes, which can include lists, pictures, and even voice clips recorded through the device's microphone. These notes can be also be synced back to Windows Live SkyDrive, Microsoft's free cloud storage solution, and then from there synced to PC-based versions of OneNote as well.

Remember, too, that in Windows Phone the various Office Mobile applications cannot be run individually. There's no way to launch Word Mobile, Excel Mobile, PowerPoint Mobile, SharePoint Workspace Mobile, or OneNote Mobile individually. Instead, you access these apps through a single interface, the Office hub. And since OneNote Mobile is the most phone-centric of all these solutions, it really does make sense that it would be the first thing you see. Chances are you're there *because* of OneNote Mobile.

Now, what were you so shocked about again?

TAKING NOTES WITH ONENOTE MOBILE

To get started with OneNote, open the Office hub and tap the New Note button. This will display a new and empty note, as shown in Figure 12-2.

From here, you can select the title field to add a title, or just start typing text-based notes. OneNote works as expected with the virtual keyboard and provides a small variety of formatting styles via the Format menu item (More, and then Format in the Application Bar). As shown in Figure 12-3, you can add or remove bold, italic, underline, and strikethrough styles, and add (yellow only) text highlighting.

> **NOTE** All OneNote Mobile formatting controls are toggles. So the first time you tap, say, the Highlight format, it will enable yellow highlighting, and that format will be applied to all subsequently typed text. To disable this format, open the Format page again and tap Highlight again.

Where OneNote Mobile really excels is in its creation of lists. You can create a basic numbered list quickly and easily by tapping the List Application Bar button, and as you can see in Figure 12-4, this list type will auto-number each line as you tap Enter.

You can also create bulleted lists, though this isn't accessible via a top-level Application Bar button. To start a bulleted list, you must instead tap More and then Bulleted List.

▶ *OneNote lists are also toggles. You select the option once to enable a list and then select it again when you're done with the list.*
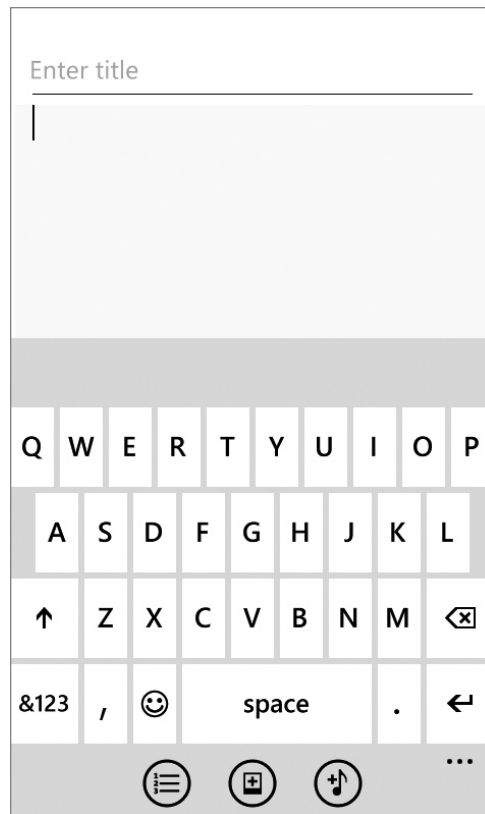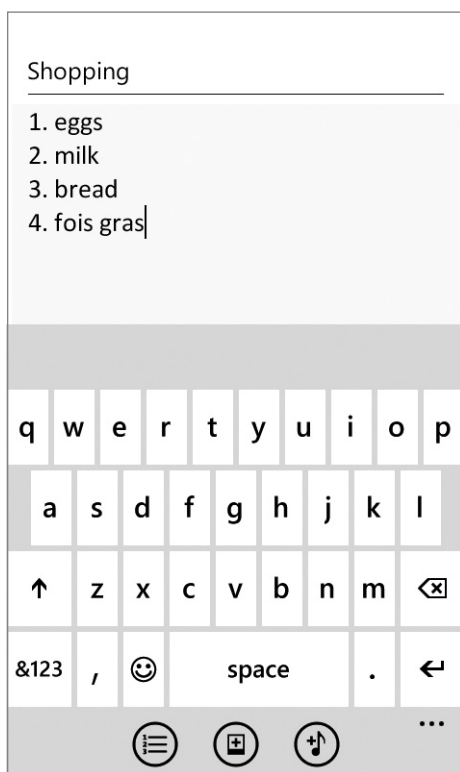
FIGURE 12-2: An empty OneNote note.

FIGURE 12-3: OneNote Mobile offers only the most basic of text formatting.
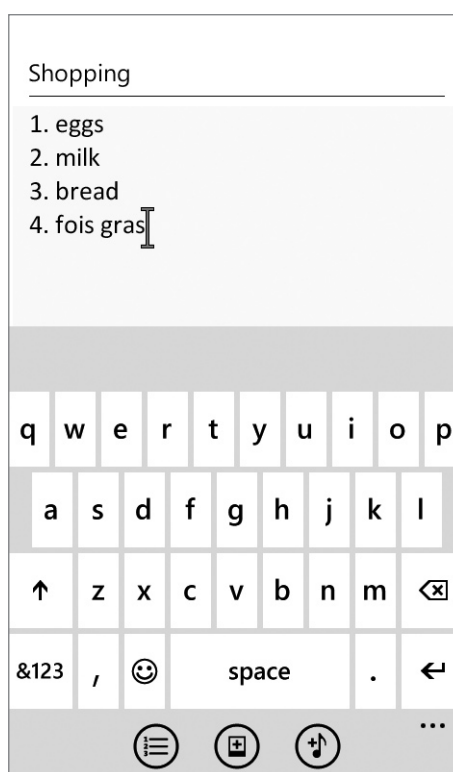
From the More menu, you will also find other simple editing controls such as Undo, Redo, Increase Indent, and Decrease Indent.

To arbitrarily move the text insertion cursor around on the OneNote writing surface, tap and hold your finger anywhere on the screen. After a second or two, an I-beam cursor will appear above your finger, so it can more easily be seen, as shown in Figure 12-5.

FIGURE 12-4: OneNote Mobile's real strong suit is quick list making.

FIGURE 12-5: It's a bit funky at first, but you can move the text insertion cursor around easily once you figure out how.

Now, move your finger around, noting that the I-beam cursor moves with it, albeit just a bit above your finger. Position the I-beam cursor—*not* you finger—where you want to insert text and let go. The normal text insertion cursor will appear in that location.

NOTE   OneNote Mobile works only in portrait mode; if you rotate the Windows Phone device into a landscape viewing mode, OneNote won't rotate with it. This is true of Word Mobile and Excel Mobile as well. PowerPoint Mobile, conversely, *only* opens in landscape mode.

▶ *If you ever want to look at a note without the virtual keyboard taking up such a huge slice of valuable onscreen real estate, just tap the device's Back button. Now you can view the note in almost full-screen mode. (The Application Bar is still visible.)*

ADDING A PICTURE TO A NOTE

OneNote Mobile also provides a simple way to add a picture to a note. Just tap the Picture Application Bar button. Windows Phone will navigate to the Pictures hub and allow you to choose from any pictures that are stored on the phone. These include pictures taken with the device's camera (Camera Roll), pictures you've downloaded from the Web (Saved Pictures), or pictures you've imported from your PC.

What it does not include, unfortunately, is access to connected pictures that otherwise display in the Pictures hub, and you won't see those pictures appear in this interface. If there is a picture you've found online that you'd like to add to a note, you'll need to save it to the phone first.

> **NOTE**   OneNote Mobile doesn't offer anything in the way of picture formatting, sizing, or editing. If you need this functionality, you'll need to sync the note to SkyDrive (as described later in this chapter) and then edit it in OneNote Web App or OneNote 2010 on the PC.

ADDING A VOICE CLIP TO A NOTE

Text notes are all well and good, but when you're out and about with your phone, you oftentimes don't have time to hunker down, look at the screen, and type detailed notes. In such a case, a voice clip might make more sense.

To add a voice clip to a note, simply tap the Audio Application Bar button. When you do, the audio recording interface shown in Figure 12-6 appears, allowing you to speak into your microphone.

FIGURE 12-6: OneNote Mobile lets you make voice recordings, which can be added to notes as clips.

When you're done recording, just tap Stop. The voice recording appears as a small icon in the note page with a short text description. If you tap this icon, OneNote Mobile will ask you if you'd like to open the attachment. Tap Open to play the recording in Windows Phone's built-in media player.

SAVING NOTES

One of the neat things about OneNote Mobile (and, really, all versions of OneNote) is that you don't have to worry about saving notes: They're saved automatically. So if you tap Back to get out of a note, OneNote Mobile will automatically save it, using the title as the name.

SYNCING NOTES WITH WINDOWS LIVE SKYDRIVE

While Office Mobile conspicuously doesn't offer a seamless way to access Word documents, Excel spreadsheets, or PowerPoint presentations via Microsoft's consumer-oriented Windows Live SkyDrive cloud storage solution, it does provide a way to automatically sync OneNote-based notes between OneNote Mobile on Windows Phone and SkyDrive.

Additionally, thanks to similar functionality in the Windows-based version of OneNote 2010, you can also add your PC to the sync-fest. So notes you create in any of the three environments—OneNote 2010 on the PC, OneNote Web App on SkyDrive, or OneNote Mobile on Windows Phone—can be automatically synced between the three environments. And it's super-simple to set up.

To configure OneNote Mobile for live syncing, launch the Office Hub. If it's not already visible, pivot to the OneNote section and tap the All button. This will display the Pages screen, which lists all of your on-device OneNote notes, as shown in Figure 12-7.
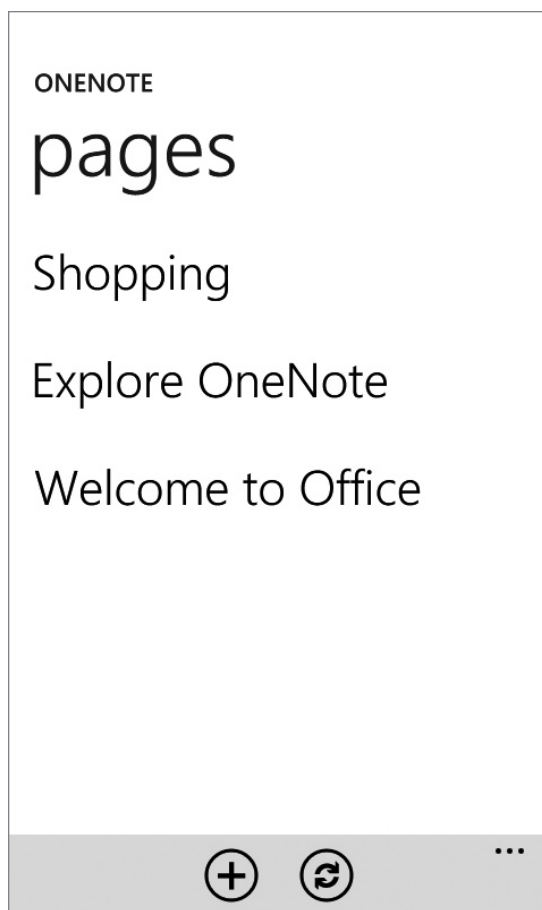
Next, tap the Refresh Application Bar button. If this is the first time you've done this, OneNote will prompt you with the message shown in Figure 12-8, offering to sync your notes with SkyDrive.

Click Yes to establish automatic sync with Windows Live SkyDrive. OneNote Mobile will connect to the online service and attempt to sync your device-based notes to the Web.

When the first sync is completed, OneNote will display a new section called Notebooks. Pivot to this section, and you will see that OneNote Mobile has also created a new web-based notebook called Personal (Web), as shown in Figure 12-9.

From here, you can drill down into the notebook, and open individual notes. More important, you can create new notes, which will automatically sync to the Web.
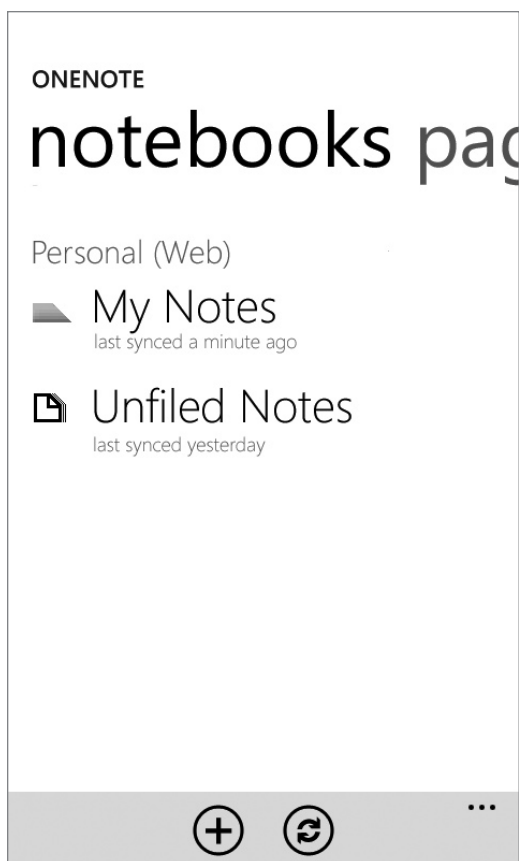
To ensure that this is working, browse to `office.live.com` from your PC's web browser and log on to your Windows Live ID if required. As you can see in Figure 12-10, there will be a new OneNote notebook named Personal (Web).
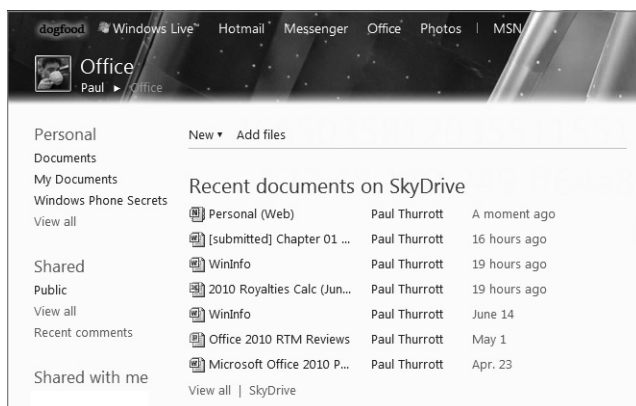
FIGURE 12-7: The OneNote Pages display lists all of your available notes.

FIGURE 12-8: Would you like to sync device-based notes with SkyDrive? Yes, yes, you would.

FIGURE 12-9: Web-based notebooks can easily be accessed from Windows Phone once you set up syncing with SkyDrive.

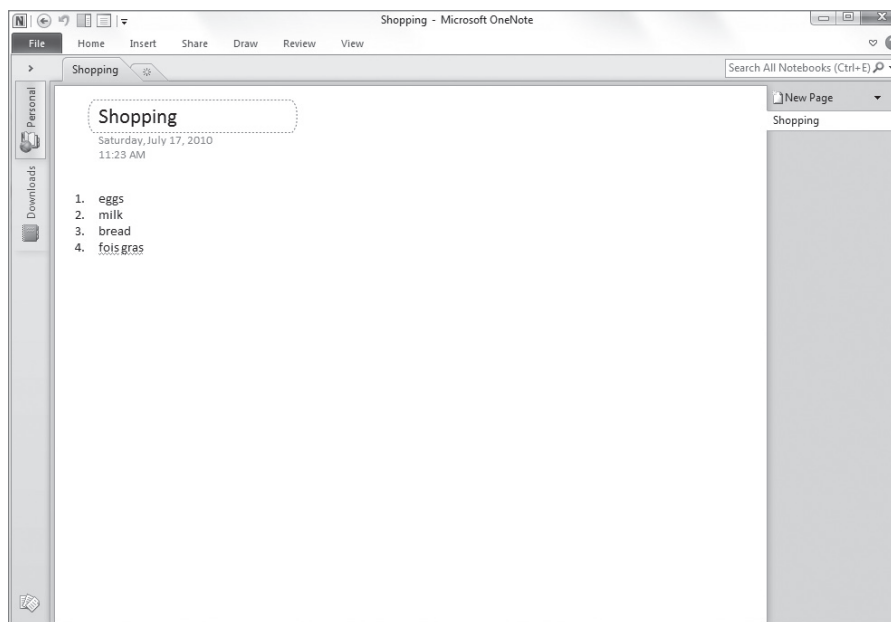**FIGURE 12-10:** A synced notebook, seen from the full Web.

And if you open up this notebook, you'll see the individual notes you've created and edited on the phone.

Any changes you make on the Web will sync back to the device (and vice versa). This includes edited notes, of course, but also other changes you may make. For example, if you rename a note or note section on the Web, those changes will be synced back to Windows Phone as well.

If you're not a OneNote user yet, OneNote Mobile may be enough to turn you into a convert. But the desktop version of this application (Figure 12-11) is even more powerful, and it can be easily configured to automatically sync with Windows Live SkyDrive as well. When you combine these three solutions—OneNote 2010 on Windows, OneNote Mobile on Windows Phone, and SkyDrive on the Web—you get the best of both worlds. Or of three worlds. Or something.

> ▶ If you're not seeing the changes, simply tap the Refresh button on the Notebooks display. Many changes require you to first close a note before syncing occurs.

FIGURE 12-11: The desktop version of OneNote can also automatically sync your notes via SkyDrive.

Telling Your Story with Word Mobile

Where OneNote Mobile offers only basic editing features, Word Mobile, Microsoft's Windows Phone–based word processing solution, turns things up a notch with more

formatting controls and additional capabilities. If OneNote seems a bit too limiting, or you simply must open a Microsoft Word document on the go, Word Mobile is the place to turn.

I assume you're familiar with word processing basics, so I want to explore how Word Mobile (Figure 12-12) expands on the text editing capabilities in OneNote Mobile.

WHICH TO USE: ONENOTE MOBILE OR WORD MOBILE?

You should also pause to consider the handful of ways in which OneNote Mobile is superior to Word Mobile. While it is relatively straightforward to add rich media such as pictures and audio files to Word documents in the desktop version of Word, you cannot do so in Word Mobile. OneNote Mobile, by contrast, does support inserting voice clips and pictures in notes. It also provides bulleted and numbered lists, two features that display properly in Word Mobile but can't be added by the application.

FORMATTING TEXT IN ADDITIONAL WAYS

Because word processing documents are meant to be seen, and aren't just notes or background material for other documents, Word Mobile includes some additional text formatting capabilities when compared to OneNote Mobile. It also includes a dedicated Format Application Bar button, which provides access to this functionality.

When you tap the Format button, the Format screen appears. In addition to the formatting abilities found in OneNote Mobile, Word Mobile adds Grow Font and Shrink Font buttons for increasing and decreasing the size of the text, respectively; two additional highlight colors (green and red); and three font colors, brown, lime and red.

WORKING IN OUTLINE VIEW

Word Mobile also sports an Outline view mode, where the display splits in half, show-ing the actual Word document on the top and the structure of the document, with indented headings, on the bottom. This is shown in Figure 12-13.
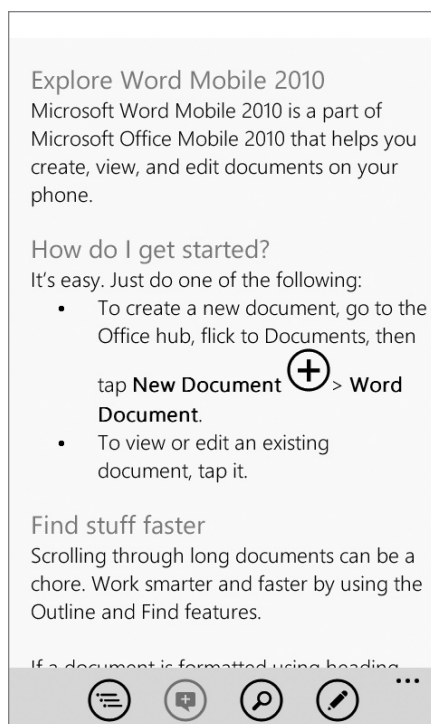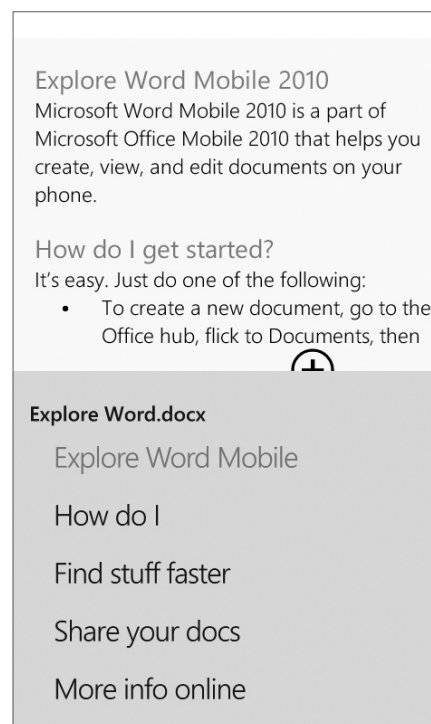
FIGURE 12-12: Word Mobile.

FIGURE 12-13: Word Mobile's Outline view.

In Outline view, you can quickly scroll through the sections of the loaded document. To jump to a location in the document, just tap on a heading in the Outline view pane.

Tap the device's Back button to exit Outline view.

ADDING AND REVIEWING COMMENTS

While Word Mobile doesn't support the full set of Track Changes functionality that's available in the desktop version of the product, it does supply one useful and related bit of functionality: The ability to add inline comments. With this tool, you can literally make a comment about the text you're reading and then when a co-worker or other collaborator views the comment, they can optionally act on it, or delete it.

To add a comment to a Word document, navigate to the place where you'd like to make the comment and then position the cursor in the appropriate place in the document. (Remember: Tap and hold until the I-beam cursor appears, and then position.)

Then, tap the Comment button. A comment edit box will appear as shown in Figure 12-14, allowing you to type a comment. When you're done, tap Back.
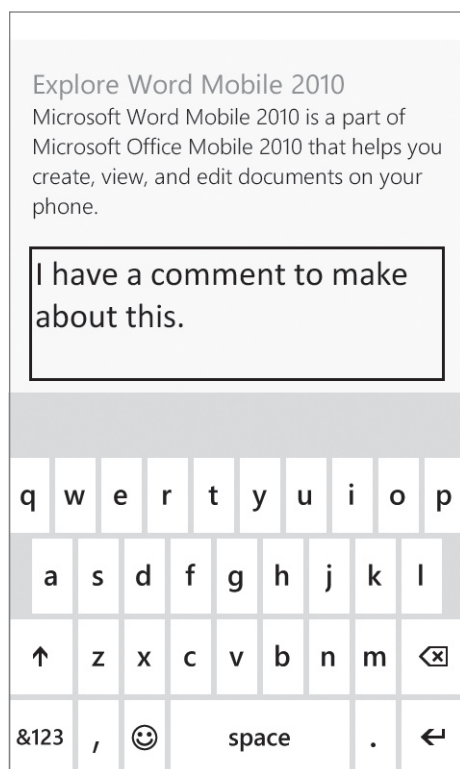
FINDING TEXT IN A DOCUMENT

Word Mobile supports the ability to find text in the currently loaded document. Curiously, you use a dedicated Find Application Bar button for this purpose and not the device's Search button.
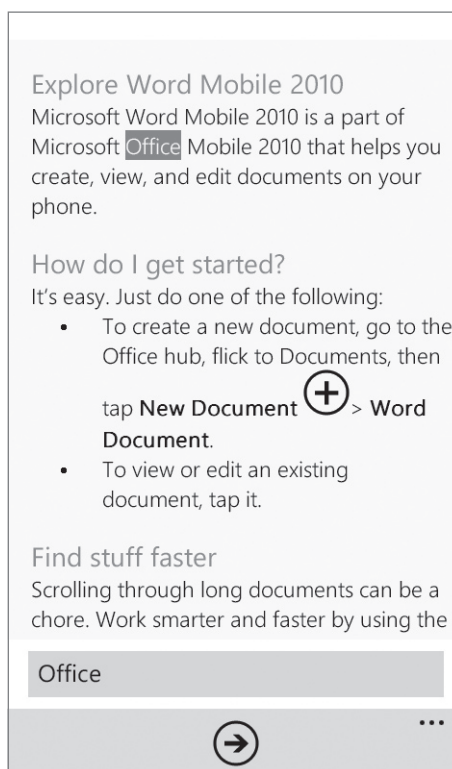
If you're familiar with the Find on Page functionality in Internet Explorer (see Chapter 8), you'll immediately grok Word's Find feature. Just tap the Find button and then enter the text you wish to find in the text box. When you hit Enter, Word will highlight the first instance of the found text, as shown in Figure 12-15, and provide a new Next button so you can navigate to subsequent matches.

Tap Back to exit this view.

▶ *The Find functionality is a bit limited. There's no Previous button, just Next, so you can't navigate backwards through the document. And Find doesn't highlight other instances of the search term simultaneously. So only the currently selected result will appear highlighted.*
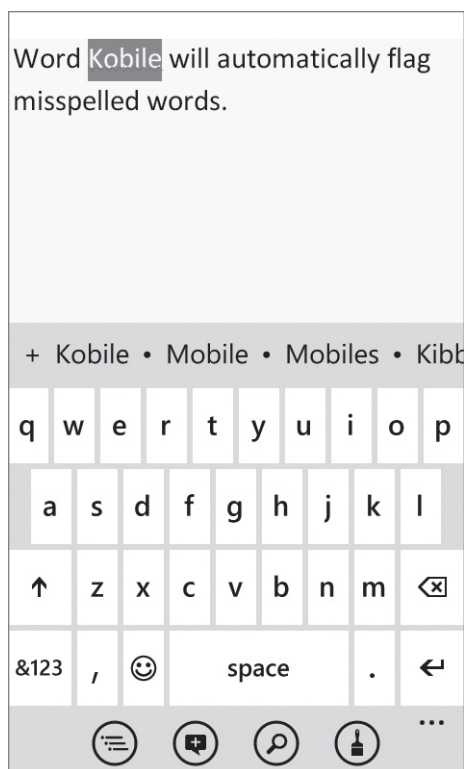
Explore Word Mobile 2010
Microsoft Word Mobile 2010 is a part of Microsoft Office Mobile 2010 that helps you create, view, and edit documents on your phone.

I have a comment to make about this.

q	w	e	r	t	y	u	i	o	p
a	s	d	f	g	h	j	k	l
↑	z	x	c	v	b	n	m	⌫
&123	,	☺	space	.	↵

FIGURE 12-14: Word Mobile lets you comment in a Word document.

Explore Word Mobile 2010
Microsoft Word Mobile 2010 is a part of Microsoft Office Mobile 2010 that helps you create, view, and edit documents on your phone.

How do I get started?
It's easy. Just do one of the following:
- To create a new document, go to the Office hub, flick to Documents, then tap **New Document** ⊕ > **Word Document**.
- To view or edit an existing document, tap it.

Find stuff faster
Scrolling through long documents can be a chore. Work smarter and faster by using the

Office

→ · · ·

FIGURE 12-15: You can easily find text within a Word document.

CORRECTING SPELLING

Word Mobile offers a useful automatic spell checking feature, which resembles the automatic spell checking on desktop versions of Word (and other Office apps): When you misspell a word, you'll see a red squiggly line underneath it (Figure 12-16).

Word Kobile will automatically flag misspelled words.

+ Kobile • Mobile • Mobiles • Kibb

FIGURE 12-16: Misspelled words are called out for correction.

▶ You can even add words to the phone's built-in spell checker. Simply highlight a misspelled word (tap and hold), and then tap the "+" button at the front of the suggestions list that appears.

This feature works in tandem with the Windows Phone auto-correct functionality, which works any time you're entering text on the phone. The difference is that spell checking will mark words you may have missed. To correct the spelling, tap the errant word to highlight it and then choose one of the auto-correct words that appear at the top of the virtual keyboard.
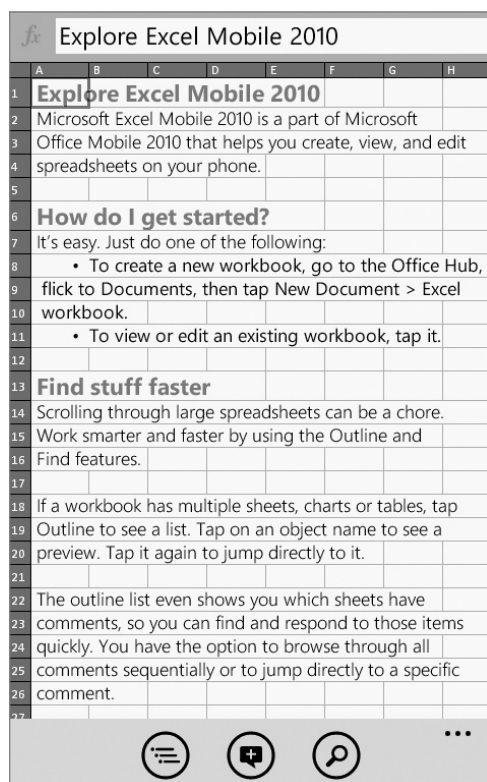
WHAT'S MISSING FROM WORD MOBILE

There are a few missing bits of functionality here. For example, while Word Mobile is smart enough to flag misspelled words, it can't help with grammar.

And oddly enough, Word Mobile on Windows Phone is missing a few features that were available in Word Mobile for Windows Mobile. Chief among these are formatting features such as text alignment and word count.

Crunching Numbers with Excel Mobile

Excel is famous around the world for its number crunching prowess, and Excel Mobile continues that tradition in the smart phone space, offering a way to create, view, and edit spreadsheets on the go. Excel Mobile is shown in Figure 12-17.

FIGURE 12-17: Excel Mobile 2010.

> **NOTE** In Excel lingo, a spreadsheet is technically called a workbook, and it can contain one or more worksheets, which are presented as tabs in desktop versions of Excel. As you'll see in a moment, these elements are presented a bit differently in Excel Mobile.
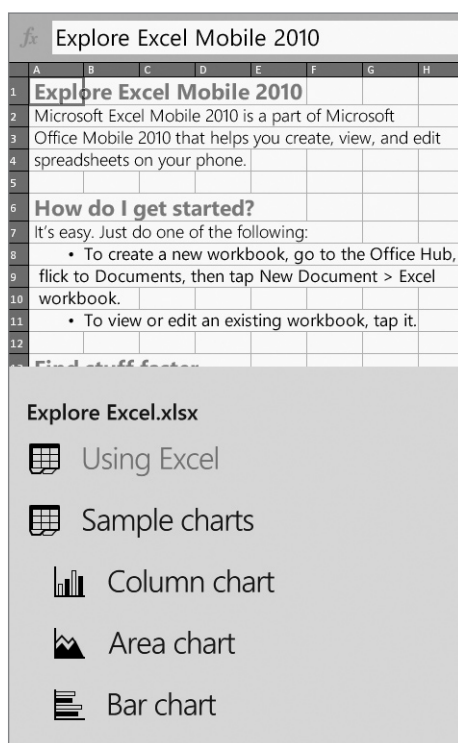
Here are some of the things you can do with Excel Mobile. (And really, I mean *some*. Though Excel Mobile provides just a tiny portion of the capabilities of the desktop version of Excel, it is a surprisingly rich application with all kinds of excellent functionality.)

ACCESSING DIFFERENT WORKSHEETS

▶ *Excel Mobile also provides a Find button that works just like the Find function in Word Mobile.*

If you're familiar with the Outline view in Word Mobile, you may be interested to know that Excel Mobile supports the same Application Bar button. But in Excel, Outline view works differently: Rather than let you navigate around a Word document by headings, in Excel Mobile it provides a way to navigate between the different worksheets in the currently loaded workbook.

Excel's Outline view can be seen in Figure 12-18.

FIGURE 12-18: Move between worksheets using Outline view.

CREATING AND NAVIGATING AROUND A WORKBOOK

When you create a new Excel workbook in Excel Mobile, you get a blank workbook with three worksheets. To see this, tap the Outline Application Bar button.

Like Word Mobile, Excel Mobile supports simple Comment and Find functions. These work nearly identically to their Word cousins and are largely obvious. You can also perform basic housekeeping tasks such as Send (via Messaging or an e-mail account), Save, and Save As.

To select a cell, just tap it.

To edit the contents of a cell, select the cell and then tap the formula bar, which is a text box at the top of the screen. From here, you can type in text or numbers, or tap the Function button ("fx") to make the cell display the result of a function.

To select a range of cells, first make sure that the virtual keyboard is not displayed. If it is, tap the device's Back button. Then, tap and hold on the cell that will be at the start of the selected range. Tap Select Cells from the pop-up menu that appears, and then drag away from that cell and select the cell range you want; you must drag your finger across the screen. If you're doing it right, it will resemble Figure 12-19.

WORKING WITH FUNCTIONS

Excel Mobile includes several built-in functions, including SUM, AVERAGE, COUNT, MAX, and MIN, and via an Advanced option, many others. You apply functions as you do in the desktop version of Excel: Choose a cell, tap the Function button, and then select the function from the list (Figure 12-20).
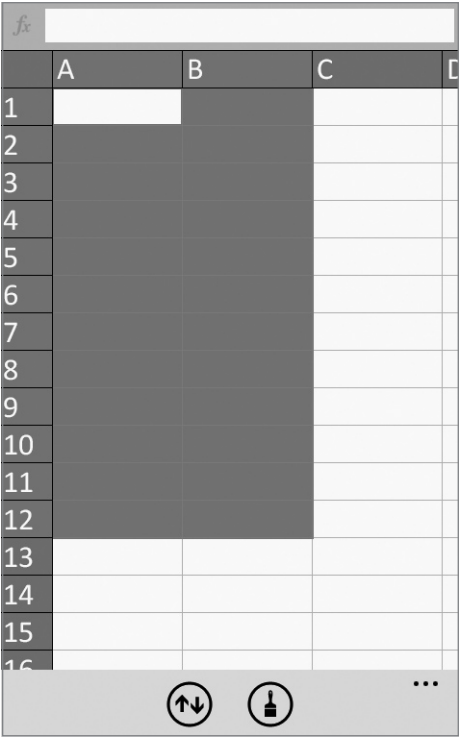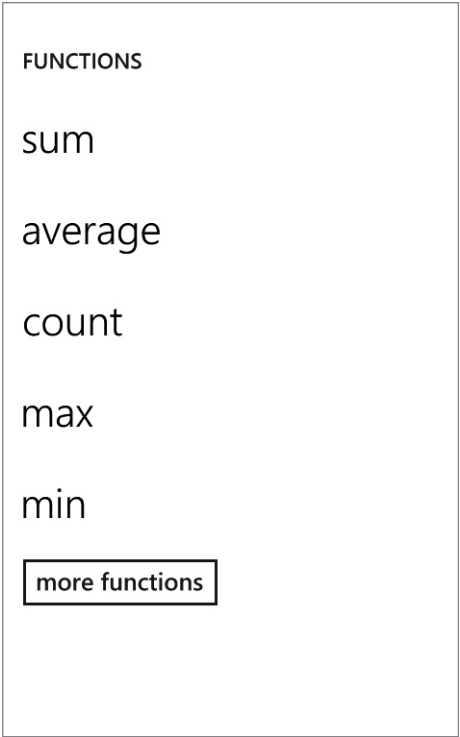
FIGURE 12-19: Selecting multiple cells.

FIGURE 12-20: Excel Mobile functions.

Then, Excel fills out the function in the formula bar, explaining in the process which variables you need to define. You can tap individual variable and then cells to fill out the formula. Or just use your editing skills to type it in manually. When you're done, tap the Enter key on the virtual keyboard and Excel Mobile will run the function, providing the correct calculation in the selected cell (Figure 12-21).

As with desktop versions of Excel, these calculations are live, so if you edit the value of a cell that is involved in a function calculation, the calculated cell value will change accordingly as well.

FORMATTING CELLS

Excel Mobile provides some basic formatting features that are similar to the format functions in Word Mobile, but with some differences. The font color options are identical, but instead of text highlighting, Excel Mobile provides a fill color, which in the context of Excel performs the same basic function: That is, it fills the background of the currently selected cell with the chosen color (red, yellow, or green).

On the text formatting front, Excel Mobile provides just the basics: bold, italics, and underlining. But it also has three commonly used number formatting types: date, accounting (that is, money or "dollar"), and percent. That way, you can select a cell, or a range of cells, and apply a formatting style accordingly.

Note that you can apply these formats to individual cells or to a range of selected cells.

▶ Missing are some variations on these styles. You can choose date, but not how the date is styled, for example, and accounting but not a specific currency.

WORKING WITH CHARTS

To create a chart based on data in a worksheet, select a range of cells and then tap the More Application Bar button and then Insert Chart. This causes the Insert Chart screen, shown in Figure 12-22, to appear.
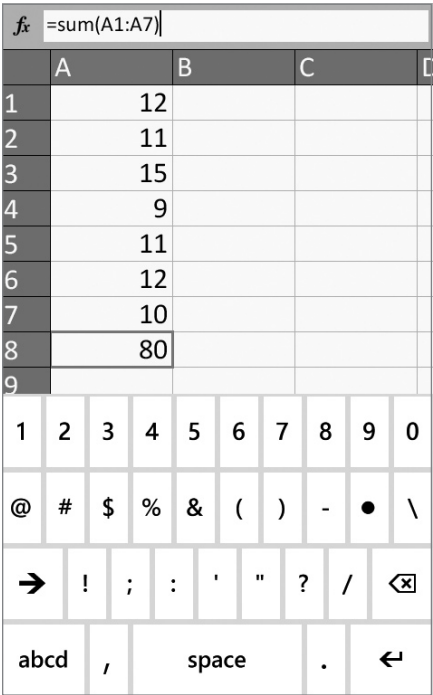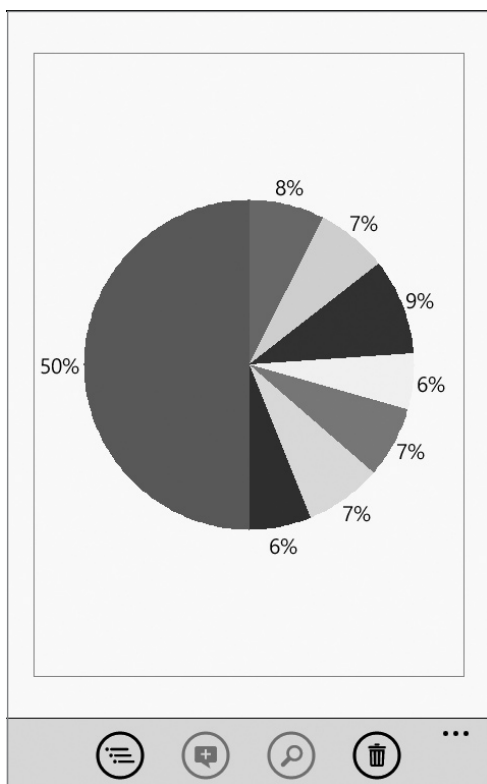
FIGURE 12-21: I can add!

FIGURE 12-22: Excel Mobile supports a number of different chart types.

Select a chart type from the list. Excel Mobile will create a new chart worksheet to accommodate the chart. A simple pie chart is shown in Figure 12-23.

FIGURE 12-23: A pie chart.

NOTE You can't really style or format the chart in any way once it's created.

Okay, that's enough Excel Mobile. As I noted earlier, there's a lot going on there, and if you're an Excel guru, you may be surprised by how much this capable little mobile app can do.

Viewing and Editing Presentations on the Go with PowerPoint Mobile

PowerPoint Mobile is a bit different from the other Office Mobile apps in that you can't actually create a new, blank presentation on the device. Instead, you can only

download, lightly edit, and save existing presentations on the device. It's also the only Office Mobile application to work in landscape (rather than portrait) view. In fact, it only works in landscape view. PowerPoint Mobile is shown in Figure 12-24.
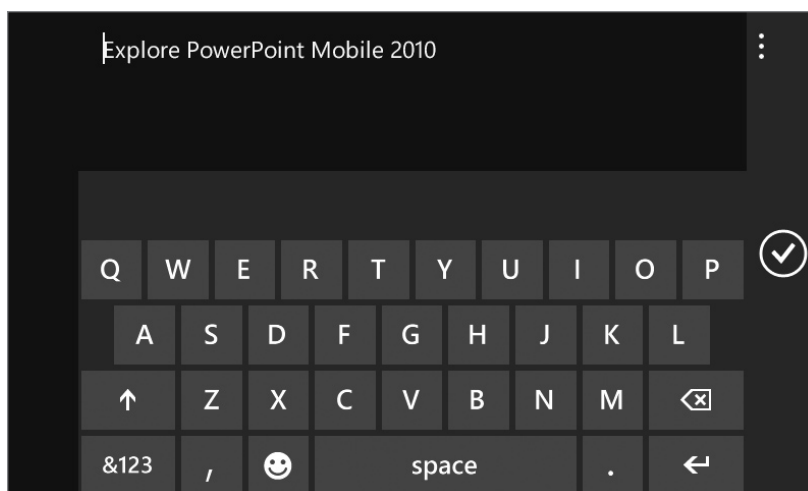

FIGURE 12-24: PowerPoint Mobile 2010.

Because of this landscape orientation, PowerPoint Mobile works a bit differently than the other Office Mobile apps tool. The Application Bar is actually hidden by default, for example. To display it, tap near the right edge of the screen. (If you don't access it quickly, it will auto-hide again.)

PowerPoint Mobile provides only a few simple options, and is in fact quite limited. These include:

▶ **Edit:** If you enable Edit mode, you can move between text boxes in each slide and edit the text. When you select a text box, PowerPoint moves into a strange editing view where the virtual keyboard takes up about 80 percent of the screen (Figure 12-25). When you're done editing, tap Done.

You can also navigate between slides, move slides, hide slides, and add notes while in edit mode. These options are all available from the Application Bar that appears while you are in edit mode.

▶ **Notes:** Like the desktop version of PowerPoint, this tiny mobile PowerPoint lets you associate text notes with each slide in a presentation. Tap the Notes Application Bar button to enter this mode and add notes to the current slide.

▶ **Outline view:** Like other Office Mobile apps, PowerPoint Mobile supports an Outline view, and in this case it lets you navigate to individual slides easily via a list of slide titles.

FIGURE 12-25: PowerPoint's editing mode.

And that's about it. PowerPoint Mobile is significantly lacking even when compared to the version that shipped earlier for Windows Mobile. That app offered support for editing and adding different transitions and animations, presentation playback options, and more. It also provided a way to use your smart phone as a smart presentation device, working in concert and wirelessly with a PC-based presentation. Maybe Windows Phone users will be so blessed in a future update.

ACCESSING ONLINE DOCUMENTS

If you believe as I do that the future of computing is both mobile and connected, then it stands to reason that Microsoft's mobile platforms and various connected services probably have a lot to offer in the way of integration. And that's certainly true enough, as you're learning throughout this book: Windows Phone connects to an amazing array of Microsoft and third-party services, and these connections are in many ways what makes Windows Phone so exciting.

When it comes to accessing Office-based documents in the cloud, however, Microsoft's consumer-oriented and business-based tools take decidedly different approaches. One is seamless and automatic, but priced according to the needs of businesses. The other is free and available to all, but is unfortunately limited as well.

Let's start with the free one.

Using Windows Live SkyDrive

Windows Live SkyDrive is Microsoft's online storage service and it provides everyone with a Windows Live ID with free access to 25GB of web-based storage. That sounds like a lot—because it is—but Microsoft really does do everything it can to prevent users from accessing that storage efficiently or easily. For example, Microsoft provides no way to access SkyDrive storage via the Windows Explorer interface in desktop versions of Windows, preventing users from dragging and dropping files between their PC and the cloud.

Likewise, on Windows Phone, there's no integrated, seamless way to sync documents between your phone and SkyDrive. Oddly enough, Microsoft does provide this functionality for the business-oriented SharePoint service, however. Why the disparity? Simple: Whereas SkyDrive is free, corporate customers pay Microsoft a lot of money, directly or indirectly, in order to use SharePoint. Thus, their lives are made easier.

> **NOTE** I explain how SharePoint/Windows Phone integration works in the next section.

So in the world of the haves and have-nots, SkyDrive users are decidedly in the have-not camp. But that doesn't mean you can't access SkyDrive-based documents from Windows Phone. You just have a bit more work to do. Here's how to make it happen.

CONNECTING TO YOUR SKYDRIVE-BASED DOCUMENTS

The first step is to connect to your SkyDrive-based document repository, which can be found at `office.live.com` on either the PC or the phone. You'll need to use Internet Explorer to access this site, and then log on with your Windows Live ID if it's not already set to auto-logon.
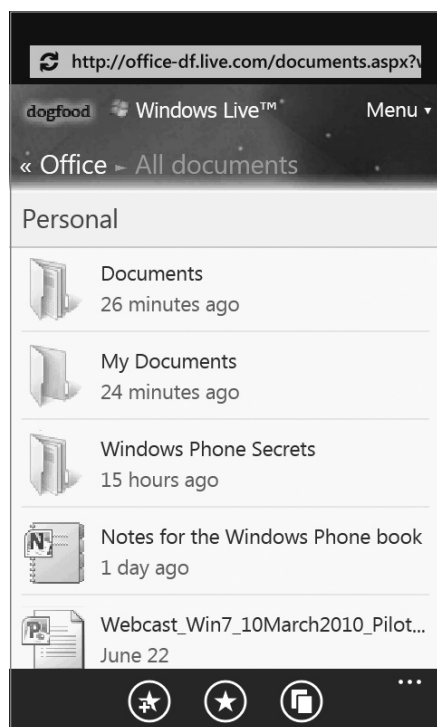
> **TIP** On the PC, you also gain access to the Office Web Apps at this address, web-based versions of Word, Excel, PowerPoint, and OneNote.

What you'll see here will vary depending on whether you've ever used or customized the site. If you're new to SkyDrive from an online document perspective, it will be empty but for a few stock folders like Personal and Shared. Otherwise, you'll see a list of folders and documents like that shown in Figure 12-26.

NOTE If you've never used SkyDrive before, it will be worth adding a few documents to the site from your PC's browser. You can do this by copying preexisting documents from your PC to the site, using SkyDrive's uploading functionality, or by using Office Web Apps to create some new documents. That way you'll at least have something to work with.

VIEWING A SKYDRIVE-BASED OFFICE DOCUMENT IN THE BROWSER

To view a Word, Excel, or PowerPoint document in a scaled-down, read-only mode, navigate through the SkyDrive interface and then tap on the appropriate file. It will display right in the browser, using a very limited version of the Office Web Apps, as shown in Figure 12-27.

FIGURE 12-26: SkyDrive can be used to store and organize Office documents.

FIGURE 12-27: It's possible to view Office documents with the mobile version of Internet Explorer.

VIEWING A SKYDRIVE-BASED OFFICE DOCUMENT WITH OFFICE MOBILE

The ability to view Office documents directly in the browser is a good one, but it's limited in that complex documents—especially Excel spreadsheets and PowerPoint presentations—don't display in very high fidelity. To overcome this, and view the
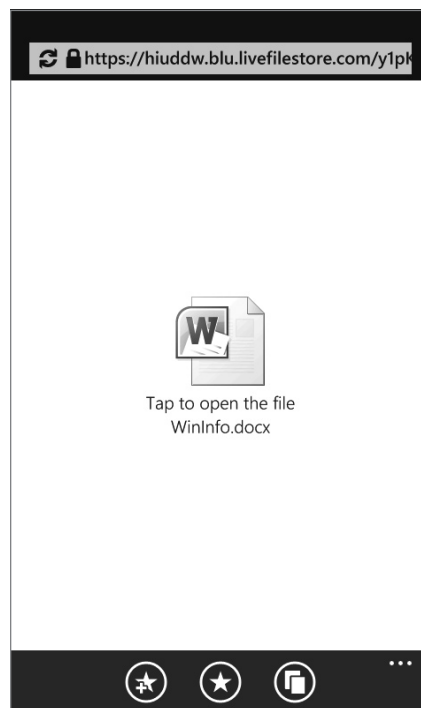
document in a more capable Office Mobile application, you can download it to the phone.

To do so, click the prominent Download link at the top of the page that's displaying the Office document. This will trigger the interesting display shown in Figure 12-28. Then you can tap the icon as instructed to download the file.

From here, you can of course view the document in a much higher fidelity environment than is made available through Internet Explorer. If you tap the Back button, however, you'll return back to IE, and the document will not be saved to the phone.

SAVING A SKYDRIVE-BASED OFFICE DOCUMENT TO THE PHONE

You may want to save the document to your phone, however. To do so, tap More and then Save As. This will display the Save to Office Hub screen shown in Figure 12-29. Rename the document if needed and then tap Save.
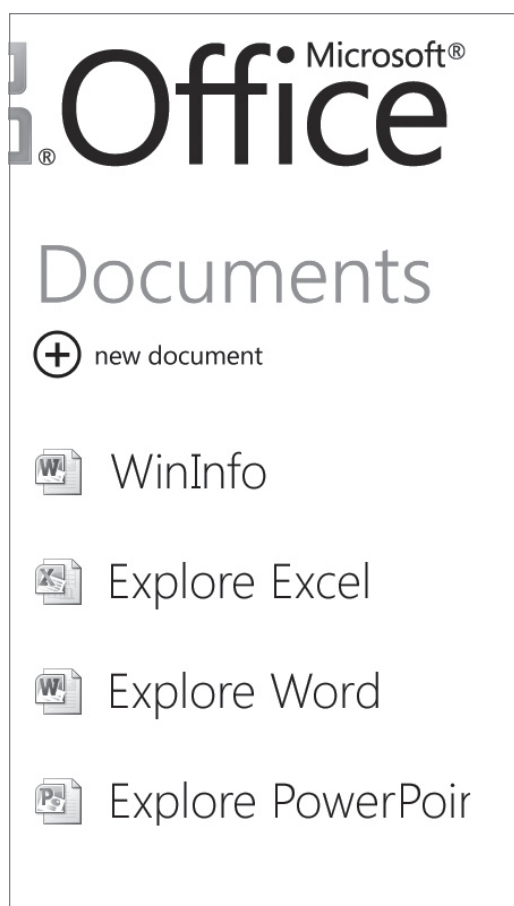
FIGURE 12-28: Office documents can also be opened, over the air, and viewed in an Office Mobile application.

FIGURE 12-29: You can also save documents, locally, to the phone.

To see that the file is saved, tap Start and then launch the Office hub. If you scroll over to the Documents section (Figure 12-30), you'll see that the saved document is now at the top of the list.

FIGURE 12-30: Saved web-based documents can be found in the Office hub's Documents list.

WINDOWS PHONE/SKYDRIVE INTEGRATION— WHAT YOU CAN'T DO

This is where Windows Phone/SkyDrive integration, such as it is, falls apart somewhat. On the PC version of the SkyDrive web site, for example, it's very easy to upload documents from the PC to the web site. But there's no such capability on Windows Phone.

So how does one get a document on Windows Phone into SkyDrive?

(continues)

(continued)

You can't do it directly, unfortunately. If you don't mind making this a mind-numbing affair and can use your PC to do part of the work, however, you could make it happen.

Here's how: E-mail the document (or documents) in question to your Windows Live account. Then, open your e-mail on the PC, either via the web-based version of Hotmail, or whatever e-mail application you prefer, and save it to the PC. Then, using the SkyDrive file uploading interface in Internet Explorer, upload the file(s) to the Web.

By this doing this, you miss out on all of the good parts of synchronization—the automation, and even version control and file check-outs—but at least it works. My hope is that Microsoft will make SkyDrive integration as seamless as is SharePoint integration in the future. Cross your fingers.

Using SharePoint

For those few users who have access to a SharePoint document repository, the Windows Phone picture is considerably brighter, and certainly more seamless, than it is with Windows Live SkyDrive. That's because Microsoft has built an incredible SharePoint client right into the Office hub.

SharePoint, for those who aren't aware, is one of the most successful platforms Microsoft has ever created. It's a server product that installs on top of modern Windows Server versions, providing collaboration and web-based publishing functionality to business users. In fact, SharePoint is a jack-of-all-trades type solution, which is part of the reason for its huge success: Businesses use SharePoint to create web sites, web portals, intranets and extranets, content management systems, wikis, blogs, and other types of web-based content sites.

Another, equally important aspect of SharePoint's success in the corporate world is that it's *self-servicing*. This means that information workers who wish to set up a site for document collaboration or other purposes can do so immediately, via a simple web-based interface, and without having to grovel to busy administrators and IT professionals who are probably already busy with other tasks. Using a simple delegation model, admins can configure SharePoint once and then leave the company's workers free to go about their business.

I'm not going to provide a thorough SharePoint overview here. You either have access to SharePoint or you don't. If you do, you're in luck, because Windows Phone has incredible SharePoint integration functionality. If you don't, you can look to this integration as a clue to what future SkyDrive integration could look like. Indeed, from the perspective of users, SkyDrive and SharePoint work similarly in terms of document storage and access. Why Windows Phone ships with vastly superior Share-Point integration is unclear.

Here's what you can do with SharePoint on Windows Phone.

> **WARNING** Windows Phone offers Office 2010–level functionality and is designed to work with the most recent version of SharePoint, which at the time of this writing is SharePoint 2010. It's possible that Microsoft may later update Windows Phone to work with older SharePoint versions, but for now SharePoint 2010 is the only option.

SITES, LIBRARIES, AND LISTS, OH MY

I don't want to get too bogged down in SharePoint terminology, but what the heck. When I think in terms of "documents stored in SharePoint," my mind immediately translates that into "document repositories" because that's really what these things are. That said, SharePoint geeks—and yes, they are out there—will point out that SharePoint has its own set of names for things. These include, among others, SharePoint *sites* (accessed just like web sites with browsers, and also via dedicated client software), *libraries* (a collection of server-based documents), and *lists* (sets of SharePoint-specific lists such as announcements, parts lists, and so on).

CONNECTING TO A SHAREPOINT SITE

The SharePoint client on Windows Phone is called SharePoint Workspace Mobile, and it is exposed as a prominent part of the Office hub. In fact, it occupies fully 50 percent of the Office hub panorama, or the two rightmost sections, or columns.

If you haven't yet connected to a SharePoint site, you can do so now by tapping the Open URL button. Then, type in the address of your SharePoint Server. You'll be prompted for a username, password, and domain as well.
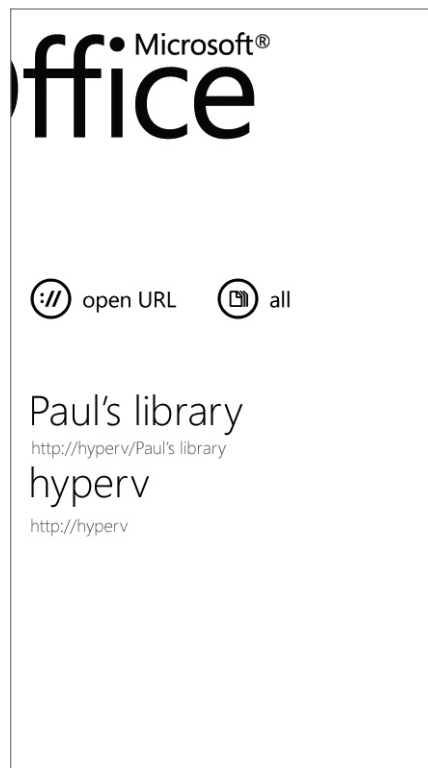
> ▶ You may need to ask your administrator or help desk for the correct URL. Normally SharePoint URLs follow the normal http://servername form. But if you have trouble connecting try the form http://servername/?Mobile=1 instead.
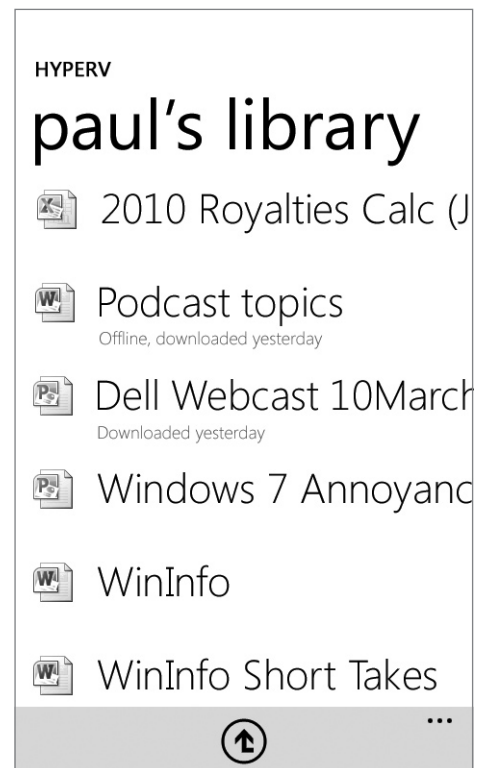
When you make the connection, SharePoint Workspace will list the various server-based libraries and lists that are available to you. This is shown in Figure 12-31.

To investigate what's available, navigate into one of the libraries or other locations. There, you'll see a list of documents, like that shown in Figure 12-32.

From here, you can do a number of things, including those tasks listed next.

FIGURE 12-31: You're connected. Now you can access SharePoint documents on the go.

FIGURE 12-32: SharePoint documents, accessible on Windows Phone.
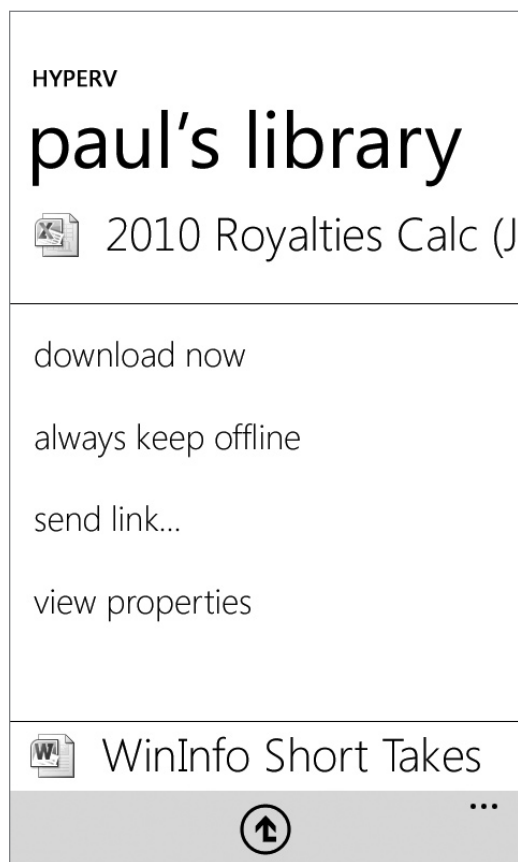
BOOKMARKING A LOCATION AS A LINK

Available via the More menu, Bookmark This Link will create a bookmark, or shortcut, to the current SharePoint location in the SharePoint Workspace Links list.

It will also be added to SharePoint Workspace's second section, or column, which includes a list of recently accessed SharePoint locations. (This new item will appear under the bookmark that was automatically created for your SharePoint server when you first made the connection.) The bookmark works just like a live tile or an Internet Explorer Favorite; when you tap it, you go right to that location.

▶ To view the SharePoint Workspace Links list, tap All.

DOWNLOADING A SHAREPOINT-BASED DOCUMENT

To download a document from SharePoint to your phone, tap and hold on the name of the document to display the pop-up menu seen in Figure 12-33. Then, tap Download Now.

FIGURE 12-33: Tap and hold to see options related to individual SharePoint documents.

In place below the document name, you'll see a message that the document is downloading until, eventually, the message changes to "Downloaded." You can now access this document at any time from the SharePoint Workspace Mobile section of the Office hub; the first pane provides a list of recently accessed documents.

VIEWING A SHAREPOINT-BASED DOCUMENT

▶ Anytime you view (or edit) a SharePoint-based document, a copy of that document is downloaded, locally, to the phone. A list of recently accessed documents is maintained in the first of the two SharePoint Workspace sections in the Office hub.

To view a document in the current SharePoint library, simply tap it in the list. SharePoint Workspace will connect to the server, download the document, and make it available for viewing.

> **NOTE**   If you attempt to open a SharePoint document that was edited elsewhere (either in the SharePoint Office Web Apps interface, or via a PC-based version of Word, Excel, or PowerPoint) since it was first opened on the phone, you will be prompted to open the new version of the document instead.

EDITING A SHAREPOINT-BASED DOCUMENT

Downloaded documents can also be edited. In Word Mobile or PowerPoint Mobile, tap the Edit Application Bar button to begin editing. In Excel Mobile, editing can begin immediately.

SAVING CHANGES TO A SHAREPOINT-BASED DOCUMENT

If you do make changes to a SharePoint-based document and exit that document, you'll be prompted to save the document. If you choose Yes, the changes will be saved to the document on the server (that is, to the original, actual document) as well as to the local copy. And if this is the first time you've done so, you'll be prompted to enter a username for yourself as well.

> **NOTE**   In case it's not obvious, any server-based files that you edit on the phone will be synced with the server, automatically. If you are offline—such as when you're on a plane—when you make the edits, those changes will be synced back to SharePoint when you reconnect.

SENDING A LINK TO A CO-WORKER

If you've edited a SharePoint-based document and would like to contact a co-worker—perhaps someone you're collaborating with at work—about the changes, you can do so right from within SharePoint Workspace Mobile.

To do so, tap and hold on the document name in library view. When the pop-up menu appears, tap Send Link. Windows Phone will display a Send From screen, and you can choose between Messaging (standard SMS text messaging) or any of your configured e-mail accounts. In either case, a web URL to the edited document will appear in the message automatically.

KEEPING CERTAIN FILES AVAILABLE WHILE OFFLINE

You can mark individual documents on SharePoint so that they are always available offline, which in this context means, "when you're not connected to the server." That way, you can ensure that you have an offline copy to work on should you be in a disconnected state.

To do so, browse a SharePoint library and find the document you'd like to mark. Then, tap and hold on the document name and choose Always Keep Offline from the pop-up menu that appears. This will ensure that the document in question is kept on the phone. But fear not: Changes you make to this offline document will still be synced to the server. So if you're connected when the changes occur, it will be synced immediately. Otherwise, changes will sync when you are later connected.

CONFIGURING OFFICE MOBILE

If you take a peek at the Settings interface for Office (which is listed as Office 2010, go figure), you'll find a couple of useful items to configure. These include:

▶ **Username:** Office Mobile is supposed to pick up the name of the registered phone user but has never actually done that in my experience. If you haven't yet configured this information—Office Mobile will ask you if it needs it—you can do so here.

▶ **SharePoint:** There are numerous options related to SharePoint Workspace Mobile, including a way to clear the cache and thus delete all temporary SharePoint files and history, a simple file conflict management interface, a way to configure the phone for Forefront Unified Access Gateway (UAG, Microsoft's server-side security product—your administrator can provide this information if it's needed), and more.

▶ **OneNote:** Here, you can determine whether OneNote Mobile automatically syncs notes with Windows Live SkyDrive. It's a simple On/Off option, and when it's set to On, notes will sync anytime you open a note page, save a note page, or open a note section.

SUMMARY

Office Mobile is in many ways the quintessential Windows Phone solution. Rather than provide you with multiple, discrete applications, Microsoft has instead provided a panoramic Office hub from which you can take notes and sync them with the Web, create and edit Word documents and Excel spreadsheets, view and edit PowerPoint presentations, and sync, over-the-air, with online SharePoint repositories.

Office Mobile is also curiously limited in some ways on Windows Phone, even in ways that its predecessor, running on the antiquated Windows Mobile system, was not. The reasons for this are varied and tied in large part to Microsoft's desire to deeply simplify (some would say *oversimplify*) its new mobile platform. But the reality is that Office Mobile is missing some curiously obvious features as a result. Hopefully, the software giant will fix these issues over time.

Ultimately, Office Mobile is exactly what Microsoft promised, however: a great mobile companion for Office users, especially those who have fully embraced the company's latest Office version for Windows, Office 2010, and the new Office Web Apps and online storage capabilities of Windows Live SkyDrive and SharePoint 2010. It's not perfect, but it does represent an important step forward toward a future that deeply integrates the PC desktop, the cloud, and the phone.