

Vision Tech

Word, Excel & Microsoft 365 Handbook

30 free step-by-step guides in plain English

Free to print and share.

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Microsoft 365 licences explained simply: home or business?

Microsoft sells Office in several ways, and the names can be confusing. The right choice matters, because using the wrong one can leave you without Teams, email or support, or break the licence terms. Prices change often, so check Microsoft's website for the current ones.

The two main families

Microsoft 365 for home. The **Personal** plan is for one person and the **Family** plan is for up to six people in a household. These are for personal, non-commercial use. They include the desktop apps such as Word, Excel and PowerPoint, plus OneDrive storage.

Microsoft 365 for business. These are paid for per user, per month, or per year, and are managed by a business administrator. Common ones are:

- **Business Basic:** online and mobile apps, business email, Teams and storage. The full desktop apps are not included.
- **Business Standard:** everything in Basic, plus the full desktop apps.
- **Business Premium:** everything in Standard, plus extra security and device management.
- **Apps for business:** the desktop apps and OneDrive, but no business email.

One-off purchase

Some versions, such as **Office Home & Business 2024**, are bought once and do not receive new features. They can be fine for one person with simple needs, but they do not include Teams for business or ongoing cloud features.

Which do I need?

- Running a business with staff and email on your own domain? Use a business plan, usually Standard or Premium.
- Home use only? Personal or Family is fine.

Do not mix them

Your sign-in decides what you can do. A work email address uses the business licence. A personal address, such as one ending @outlook.com, uses a personal one. To see which you are signed in with, open any Office app and click **File**, then **Account**.

Good to know

- If a subscription ends, files stay yours, but apps become read-only.
- Never buy cheap keys from unknown websites. They can stop working.

When to get more help

If you are choosing or changing plans, or you are unsure what you are paying for, contact us for an independent view.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

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Office says 'Product deactivated' or 'Unlicensed product'

Seeing a banner such as 'Product Deactivated', 'Unlicensed Product' or 'Activation failed' is worrying, but it is usually fixable. It means Office cannot confirm that your account has a valid licence, so it limits what you can do. Often your files are fine and you can still open and read them.

Check which account you are using

1. Open Word or Excel and click **File**, then **Account**.
2. Look at the user information. Is it the right email address? Sometimes people sign in with a personal address when their licence is on their work address, or the other way round.
3. If it is wrong, click **Sign out**, close all Office programs, reopen one and sign in with the correct account.

Common reasons

- **The subscription expired or was not paid.** Check with whoever manages your account.
- **The licence was removed.** An administrator may have unassigned it by mistake, perhaps when changing plans.
- **Too many devices.** Most plans limit how many devices you can install on. Signing out of devices you no longer use can free one up. Business administrators and home account owners can manage this on their Microsoft account pages.

Try these fixes

1. Sign out and sign in again, as above.
2. Restart the computer.
3. Update Office: click **File**, **Account**, **Update Options**, then **Update Now**.
4. Remove saved Office sign-ins: open **Credential Manager** from the Windows search box, choose **Windows Credentials**, and remove entries with Office or MicrosoftOffice in the name. Then sign in again.
5. Check the licence on the web. A business admin can look at the licences in the Microsoft 365 admin centre. At home, sign in at your Microsoft account page and check **Services & subscriptions**.

What not to do

- Do not enter keys from unknown sources.
- Do not use 'activators' downloaded from the internet. They often contain malware.

When to get more help

If the message appears on several computers or after a plan change, contact us. We can check your licences and reassign them correctly.

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Office will not open: how to repair it safely

If Word, Excel or Outlook crashes at start, freezes, or says it needs repairing, Windows has a built-in repair tool that is usually safe. It repairs the programs themselves and leaves your documents, emails and settings alone, although a full backup is always wise.

Try the simple things first

1. Close the program fully. If it seems stuck, press Ctrl+Shift+Esc to open **Task Manager**, find the program, right-click it, and choose **End task**.
2. Restart your computer.
3. Hold the Ctrl key while you click the Office app to start it in **Safe Mode**. Answer **Yes**. If it opens, an add-in may be the problem. Click **File, Options, Add-ins**, then at the bottom choose **COM Add-ins** from the **Manage** list and click **Go**. Untick any you do not recognise, one at a time.

Run Quick Repair

1. Open **Settings**, then **Apps**, then **Installed apps**. On Windows 10 it is called **Apps & features**.
2. Find **Microsoft 365** (or **Microsoft Office**) in the list.
3. Click the three dots, or select it, and choose **Modify**. Click **Yes** if asked for permission.
4. Choose **Quick Repair** and click **Repair**.

This takes a few minutes and works offline. Try opening Office again when it finishes.

If that does not work: Online Repair

Repeat the same steps but choose **Online Repair**. This takes longer, needs the internet and reinstalls Office, which fixes more problems. Leave the computer on and plugged in. Your files are not removed, but save and close everything first.

After the repair

Open an Office app and, if it asks, sign in. Then check **File, Account, Update Options, Update Now**, for the latest version.

What not to do

- Do not delete folders by hand from Program Files.
- Do not install Office from unofficial download sites.
- Do not uninstall Office until you know how to sign in again and where your licence is.

Common problems

- **Repair option missing:** your computer may be managed by your organisation.

When to get more help

If repair does not help, or you see error codes, contact us. Take a photo of the message to help us find the cause.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

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Word: track changes explained

Track Changes lets you and your colleagues edit a document while Word keeps a record of every addition, deletion and formatting change. It is ideal for checking each other's work, because nothing is lost until someone accepts it.

Menu names can differ slightly between versions of Microsoft 365, but the ideas below stay the same.

Turn it on and off

1. Open the document and click the **Review** tab.
2. Click **Track Changes** so it looks pressed in. You can also press Ctrl+Shift+E.
3. Start typing or deleting. Your edits now show in colour, usually with a line in the margin.

Click the button again to turn tracking off. Anything already marked stays marked.

Read the changes

Next to the **Track Changes** button is a menu with options such as **Simple Markup**, **All Markup**, **No Markup** and **Original**. **Simple Markup** shows a red line in the margin and keeps the page tidy. **All Markup** shows every change in full. **No Markup** shows how the document will look if everything is accepted, but the changes are still there, hidden.

Accept or reject changes

1. Click on a change.
2. Click **Accept** to keep it, or **Reject** to throw it away. These buttons are in the **Changes** group on the **Review** tab.
3. Word jumps to the next change. Repeat until done.

The small arrow under **Accept** gives the choice **Accept All Changes**. Use that only when you have read everything.

Comments

Comments are separate from tracked changes. Use **New Comment** on the **Review** tab to leave a note in the margin. You can reply to a comment or mark it as resolved.

Common problems

- **Text looks wrong or has odd colours:** the document may be showing **All Markup**. Switch to **No Markup** to see the clean version.

On a Mac the **Review** tab is in the same place.

When to get more help

If a document is full of changes you cannot make sense of, or Track Changes seems to switch itself on, contact us before you accept everything and lose someone's work.

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Word: how to add page numbers

Page numbers help readers find their way around a longer document. Word can add them for you automatically, and they update themselves if pages are added or removed.

Add page numbers

1. Click the **Insert** tab.
2. Click **Page Number**.
3. Choose **Top of Page** or **Bottom of Page**, then pick a style. A plain number on the right or in the centre is a safe choice.
4. Click **Close Header and Footer** (or double-click in the main body of the page) to return to your writing.

Start on a different number or skip the first page

Many documents have a cover page with no number.

1. Double-click the header or footer area to open it.
2. On the **Header & Footer** tab that appears, tick **Different First Page**.
3. The first page is now blank in the footer, and page 2 shows the number 2.

To make the number start at a different value, click **Page Number**, then **Format Page Numbers**, and set **Start at**. Choosing 0 makes the page after the cover show as 1.

Show 'Page 1 of 10'

Click **Page Number**, choose **Bottom of Page**, then scroll the gallery to find a style that says **Page X of Y**.

Change how the number looks

Double-click the footer, select the number, and change the font or size on the **Home** tab like any other text.

Common problems

- **The numbers vanish after the first section:** your document may have section breaks. Double-click the footer of the missing page and look for **Link to Previous** on the **Header & Footer** tab. Make sure it is highlighted if you want the same numbers throughout.
- **Different numbers on odd and even pages:** untick **Different Odd & Even Pages** on the **Header & Footer** tab if you did not want that.
- **The number looks grey:** this is normal while you are editing the document. It prints in full colour.

On a Mac the steps are very similar, using the **Insert** menu or tab.

When to get more help

If page numbers behave strangely in a long report with many sections, or a template keeps overriding your settings, we can help sort it out.

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Word, Excel & Microsoft 365 | Medium | 2 min read

Word: how to make a table of contents

A proper table of contents in Word builds itself from your headings and can be updated with one click. It also lets readers jump to a section by clicking it. The secret is to use Word's heading styles instead of just making text big and bold.

Step 1: mark your headings

1. Click in a heading line.
2. On the **Home** tab, find the **Styles** gallery.
3. Click **Heading 1** for main headings. Use **Heading 2** for sub-headings under them.

Do this for every heading in the document. If you do not like the look, right-click the style, choose **Modify**, and change the font or colour once. Every heading updates at the same time.

Step 2: insert the table

1. Click where you want it, usually after the cover page.
2. Click the **References** tab.
3. Click **Table of Contents** and choose **Automatic Table**.

The page numbers and headings appear straight away.

Step 3: keep it up to date

Word does not update the table every time you type. When you have finished editing:

1. Click inside the table of contents.
2. Click **Update Table** at the top of it. Choose **Update entire table** if you added or renamed headings, or **Update page numbers only** if only the pages moved.

Always update just before saving, printing or sending.

Common problems

- **A heading is missing:** it is probably not using a heading style. Apply **Heading 1** or **Heading 2**, then update the table.
- **Something odd appears in the list:** a line of normal text may have been given a heading style by accident.
- **Page numbers are wrong:** update the table again, as above.
- **Finding your way around:** tick **Navigation Pane** on the **View** tab to see all your headings in a list. This is handy for moving around a long document.

If you save as a PDF, the clickable links usually carry over.

When to get more help

If a table of contents looks broken, will not update, or a document made by someone else uses unusual styles, ask us to take a look.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Advanced | 2 min read

Word: how to mail merge letters and labels

A mail merge lets you write one letter and have Word fill in each person's name and address from a list. It saves hours when you are sending the same letter to many people or printing address labels.

Ribbon names differ a little between versions, but everything lives on the **Mailings** tab.

Prepare your list first

The list is usually an Excel spreadsheet. Before you start:

- Put column headings in the first row, such as Title, FirstName, Surname, Address1, Postcode.
- Have one person per row, with no blank rows or merged cells.
- Format postcode and phone number columns as **Text** so leading zeros are not lost.
- Save and close the spreadsheet.

Set up the merge

1. Open a new Word document and click the **Mailings** tab.
2. Click **Start Mail Merge** and choose **Letters** (or **Labels** or **E-mail Messages**).
3. Click **Select Recipients**, then **Use an Existing List**, and choose your spreadsheet. If asked which sheet, pick the one with your data.
4. Type your letter. Where you want a name, click **Insert Merge Field** and choose the heading, for example **FirstName**.
5. For an address block, click **Address Block**. For a greeting, click **Greeting Line**.

Check and finish

1. Click **Preview Results** and use the arrows to flip through the records.
2. If one looks wrong, fix the spreadsheet and reopen the merge.
3. Click **Finish & Merge**, then **Edit Individual Documents** to produce a new document with every letter in it. Check it before printing. Choose **Print Documents** to send it straight to the printer.

Sending by email works with classic Outlook installed. It may not work with other mail programs or the newer Outlook.

Common problems

- **Postcodes lose a zero or dates look odd:** the spreadsheet formatting is the cause, so change the column to **Text**.
- **You get a message about data sources:** the spreadsheet may have moved or be open elsewhere. Close it and try again.

On a Mac the **Mailings** tab works in the same way.

When to get more help

If your first merge is for something important, such as invoices or customer letters, contact us and we can walk through it with you before you print anything.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

Word: why your formatting keeps changing

Pasting text and watching it change font, size or spacing is one of the most annoying things in Word. It usually happens because Word is trying to be helpful and copying styles from somewhere else. The good news is that it can be tamed.

Paste without bringing the formatting along

1. Copy your text as normal.
2. In Word, press Ctrl+Shift+V and choose **Text Only** where the choice appears. Or right-click and choose the clipboard icon marked **A (Keep Text Only)**.

The text then takes on the look of wherever you pasted it.

Reset the odd bits

1. Select the text that looks wrong.
2. On the **Home** tab, click **Clear All Formatting**. It is the small icon with an **A** and a pink eraser.
3. If the text is then plain, apply the style you want from the **Styles** gallery.

Use styles, not hand-formatting

If you change every heading by hand, Word will fight you later. Instead:

1. Select a heading, set it how you like.
2. Right-click the matching style (for example **Heading 1**) in the **Home** tab and choose **Update Heading 1 to Match Selection**.

All headings in the document now match.

See what is going on

Click the **Show/Hide** button (the ¶ symbol on the **Home** tab) to display hidden marks such as spaces, tabs and paragraph breaks. Strange gaps are often extra paragraph marks or lots of spaces.

Stop automatic changes

- **Lists that appear by themselves:** click the small lightning bolt icon that appears after Word starts a list, and choose **Stop Automatically Creating Numbered Lists**.
- **Other auto-corrections:** click **File**, then **Options**, then **Proofing**, then **AutoCorrect Options**, and look at the **AutoFormat As You Type** tab.

Default paste setting

In **File**, **Options**, **Advanced**, look under **Cut, copy, and paste** to set what Word does by default.

On a Mac look under the **Word** menu, then **Preferences**.

When to get more help

If one particular document keeps going wrong, or a company template is causing the problem, send it to us rather than rebuilding it by hand.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Word: how to set spell-check to English (UK)

If Word keeps underlining words like colour or organise in red, or suggests American spellings, its proofing language is set to US English. This is quick to fix, and you can make it permanent.

Change the language for the document you have open

1. Press Ctrl+A to select everything in the document.
2. Click the **Review** tab.
3. Click **Language**, then **Set Proofing Language**.
4. Choose **English (United Kingdom)**.
5. Make sure **Do not check spelling or grammar** is not ticked.
6. Click **OK**.

The red underlines should vanish for the correct UK spellings.

Make UK English the default for new documents

Open the same box (**Review**, **Language**, **Set Proofing Language**), choose **English (United Kingdom)**, click **Set As Default**, and confirm. Word may ask you to agree that this affects all new documents based on the usual template. Say yes.

Check the status bar

At the bottom of the Word window you can usually see the language, for example **English (United States)**. Clicking it opens the same box. If it is not visible, right-click the status bar and tick **Language**.

Check the Windows setting

Open **Settings**, then **Time & language**, then **Language & region**, and check that your region is **United Kingdom**. This helps with dates and the pound sign across all programs.

Common problems

- **Only some of the text is still wrong:** that text may have been pasted in from a US source. Select all again and reapply the language.
- **Spell-check is not working at all:** go to **File**, **Options**, **Proofing** and tick **Check spelling as you type**.
- **Other Office programs still show US spelling:** Outlook and PowerPoint have their own settings. In **File**, **Options**, **Language** you can choose the editing language.
- **On a Mac:** open the **Tools** menu, then **Language**, and choose English (UK).

When to get more help

If this keeps resetting on a work computer, the setting may be controlled by your organisation, and we can help change it properly.

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Word, Excel & Microsoft 365 | Advanced | 2 min read

Excel: XLOOKUP and VLOOKUP explained simply

A lookup formula finds a value in a list and brings back something from the same row. For example, you type a product code and Excel fetches the price. It is just like looking up a name in a phone book and reading across to the number.

Which one should I use?

XLOOKUP is the newer, easier choice. It is available in Microsoft 365 and Excel 2021 and later.

VLOOKUP is older but works in every version, so you will see it in many workbooks. If a colleague on an older Excel needs to open your file, use VLOOKUP.

XLOOKUP

The pattern is: what to find, where to find it, what to return.

Suppose codes are in A2:A50 and prices are in C2:C50, and you typed a code in E2. In F2 type:

```
=XLOOKUP(E2, A2:A50, C2:C50, "Not found")
```

Excel looks for E2 in the code column and returns the matching price. The last part is the message shown if there is no match.

VLOOKUP

The pattern is: what to find, the table, which column to bring back, and exact match.

```
=VLOOKUP(E2, A2:C50, 3, FALSE)
```

The table must start with the column holding the codes. The **3** means 'bring back the third column of that table'. **FALSE** means 'exact matches only', and you almost always want this.

Tips

- Press the **F4** key while the cursor is on a range to lock it with dollar signs. This stops it shifting when you copy the formula down.
- Both formulas ignore capital letters.
- Excel starts suggesting the formula after you type `=XLOOKUP(` and shows what each part means.

Common problems

- **#N/A**: nothing matched. Check for spelling differences or extra spaces. Numbers stored as text will not match real numbers (see our guide on numbers stored as text).
- **Wrong answer from VLOOKUP**: you may have left off **FALSE**.
- **#NAME?**: you may be using XLOOKUP in an older version of Excel that does not have it.

The formulas are identical on a Mac.

When to get more help

If a lookup returns wrong values in something important, such as pricing or payroll, ask us to check it before it is used.

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Word, Excel & Microsoft 365 | Medium | 2 min read

Excel: conditional formatting basics

Conditional formatting changes how a cell looks based on what is in it. You can make overdue dates turn red, highlight sales over a target, or add small bars to show how big numbers are. It updates itself as the numbers change.

Highlight cells above a number

1. Select the cells you want to check, for example a column of sales.
2. Click the **Home** tab, then **Conditional Formatting**.
3. Choose **Highlight Cells Rules**, then **Greater Than**.
4. Type the number, such as 1000, and choose a colour from the drop-down list.
5. Click **OK**.

Any cell above 1000 now changes colour. Other choices in the same menu include **Less Than**, **Between**, **Equal To**, **Text that Contains** and **A Date Occurring**.

Find the biggest or smallest

Choose **Top/Bottom Rules** and pick something like **Top 10 Items** or **Below Average**. You can change the 10 to any number.

Data bars and colour scales

- **Data Bars** put a coloured bar in each cell, longer for bigger numbers.
- **Color Scales** shade cells from one colour to another, like a heat map.
- **Icon Sets** add traffic lights or arrows.

Pick one from the menu and see how it looks. If you do not like it, you can undo it with Ctrl+Z.

Colour a whole row

This needs a formula, so it is a little harder. Select the rows, choose **Conditional Formatting**, then **New Rule**, then **Use a formula to determine which cells to format**. For example `=D2="Overdue"` colours every row where column D says Overdue. The dollar sign locks the column.

Edit or remove rules

Click **Conditional Formatting**, then **Manage Rules**. Choose to show rules for **This Worksheet** and you can edit or delete any of them. To remove all rules, choose **Clear Rules**, then **Clear Rules from Entire Sheet**.

Common problems

- **Colours stay when the cell no longer qualifies:** the colour may have been added by hand rather than by a rule.

Mac users find the same options on the **Home** tab.

When to get more help

If a spreadsheet has become slow or full of conflicting rules, get in touch and we can tidy it up for you.

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Word, Excel & Microsoft 365 | Medium | 2 min read

Excel: fix numbers stored as text

If Excel will not add up a column, or your numbers sit on the left of the cell instead of the right, they are probably stored as text. Excel sees them as words that merely look like numbers. This often happens with data copied from a website, email or another system.

How to spot it

- The numbers are left-aligned.
- A small green triangle sits in the corner of the cell.
- The total at the bottom of the screen (the status bar) shows a count but no sum.
- Formulas such as SUM ignore the cells, and lookups fail to match.

Fix 1: the quick warning icon

1. Select the affected cells.
2. Click the yellow warning icon that appears beside them.
3. Choose **Convert to Number**.

Fix 2: Text to Columns

This works well for a whole column at once.

1. Select the column.
2. Click the **Data** tab, then **Text to Columns**.
3. Click **Finish** straight away, without changing any options.

Fix 3: multiply by one

1. Type 1 in any empty cell and copy it with Ctrl+C.
2. Select the numbers.
3. Right-click, choose **Paste Special**, then pick **Multiply** and click **OK**.
4. Delete the cell holding the 1.

If the cells are formatted as Text

On the **Home** tab, change the format drop-down from **Text** to **General**. Changing the format does not alter existing entries. After that, click in each cell and press Enter, or use Fix 2.

Hidden spaces

If the fixes above do not work, there may be spaces or odd characters. In a spare column, type =TRIM(A2) and copy it down. This removes extra spaces. Then copy the results and paste them back as values using **Paste Special**, then **Values**.

Things to watch

- Telephone numbers, account numbers and postcodes should stay as text, so leave them alone.
- Make a copy of the file before you try anything new.

On a Mac the same options appear on the **Data** and **Home** tabs.

When to get more help

If a whole file of imported figures will not behave, send it to us. We can usually clean it up quickly and show you how.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Excel: why you see ##### in a cell

Seeing a row of hash signs (#####) in a cell looks alarming, but your data is almost certainly fine. Excel is simply telling you it cannot fit the contents into the space.

Most common cause: the column is too narrow

The fix takes two seconds.

1. Move your pointer to the line between two column letters at the top, for example between **B** and **C**.
2. When the pointer becomes a double-headed arrow, double-click.

The column widens to fit. You can also click the cell, then choose **Home**, **Format**, **AutoFit Column Width**. If you want to widen several columns, select them first.

Another cause: a negative date or time

Excel cannot show a date or a time that is below zero, and it fills the cell with hash signs instead. Check the calculation that produced it. A common cause is subtracting a later time from an earlier one, such as an end time that is before the start time.

Other things to try

- **Shrink the text:** select the cells, press Ctrl+1, open the **Alignment** tab and tick **Shrink to fit**. Use this carefully, as tiny numbers are hard to read.
- **Use a smaller font** or fewer decimal places. The **Decrease Decimal** button is on the **Home** tab.
- **Wrap long text:** if a cell holds words rather than numbers, click **Wrap Text** on the **Home** tab.
- **Change the number format:** if the value is huge, a different format may help. Right-click, choose **Format Cells** and pick **Number**.

Does it print as hashes?

Yes, if it appears on screen it will print that way, so fix it before printing or emailing.

Is anything lost?

No. Click the cell and look at the formula bar above the sheet. The real number or date is shown there.

Tip

Select the whole sheet by clicking the small triangle at the top left corner, then double-click any column border. Every column tidies itself in one go.

This works the same on a Mac.

When to get more help

If you still see hashes after widening the column, or negative dates keep appearing in an important workbook, ask us to look at it.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Excel: how to print a sheet to fit on one page

Few things are more irritating than printing a spreadsheet and finding that one column has spilled onto a second page. Excel has a setting that shrinks everything to fit, and you do not need to resize anything yourself.

Fit everything on one page

1. Click the **Page Layout** tab.
2. In the **Scale to Fit** group, set **Width** to **1 page**.
3. Set **Height** to **1 page** if you want it all on a single sheet. Choose **Automatic** if you only mind about the width, as long sheets can then run over several pages.

You can also do it from print preview: press Ctrl+P, find the scaling option near the bottom of the settings and choose **Fit Sheet on One Page** or **Fit All Columns on One Page**.

Switch to landscape

Wide spreadsheets usually fit better sideways. On **Page Layout**, click **Orientation** and choose **Landscape**.

Print only part of the sheet

1. Select the cells you want.
2. On **Page Layout**, click **Print Area**, then **Set Print Area**.

To go back to printing everything, choose **Clear Print Area**.

Repeat headings on every page

On **Page Layout**, click **Print Titles**. In **Rows to repeat at top**, click the box and then click the row number holding your headings. Click **OK**.

Check before you print

Always press Ctrl+P first. The preview on the right shows exactly what will come out. If the writing looks tiny, tidying the sheet may help. Hide columns you do not need, or choose a larger paper size such as A3 if your printer can handle it.

Page Break Preview

On the **View** tab, choose **Page Break Preview** to see blue lines showing where pages break. You can drag the lines to change them. Click **Normal** to go back.

Common problems

- **The text is too small:** you are probably fitting too many columns on one page. Trim some columns first.

On a Mac the **Page Layout** tab is in the same place.

When to get more help

If printing still fails or comes out wrong, the issue may be with the printer rather than Excel, so contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

Excel: how to protect a sheet so cells cannot be changed

Protecting a sheet stops people accidentally overwriting formulas or headings. It is great for forms and shared workbooks. It is not strong security, so do not use it to hide private information.

How protection works

Every cell in Excel is 'locked' by default, but the lock does nothing until you protect the sheet. So the usual approach is to unlock the cells people are allowed to edit, then switch protection on.

Step 1: unlock the cells people may edit

1. Select the cells that should stay editable, such as input boxes.
2. Press Ctrl+1 to open **Format Cells**.
3. Click the **Protection** tab.
4. Untick **Locked** and click **OK**.

Step 2: protect the sheet

1. Click the **Review** tab.
2. Click **Protect Sheet**.
3. Type a password if you want one. It is optional.
4. Choose what people can still do, such as selecting cells or formatting columns.
5. Click **OK**, and retype the password if asked.

Anyone who tries to change a locked cell now sees a message saying the cell is protected.

Remove protection

Click **Review**, then **Unprotect Sheet**, and enter the password if there is one.

Protect the whole workbook

- **Protect Workbook** on the **Review** tab stops people adding, deleting or renaming sheets.
- To make people enter a password before even opening a file, choose **File, Info, Protect Workbook, Encrypt with Password**.

Important warnings

- **Write the password down somewhere safe.** If you lose a file's open password it is very hard to recover, and Microsoft cannot help.
- Sheet protection can be got around by a determined person. Treat it as a safeguard against mistakes, not a lock on a safe.
- Do not use your email or banking password.

Common problems

- **I cannot edit anything:** you have probably forgotten to unlock the cells in step 1.

- **Some buttons are greyed out:** the sheet is protected. Unprotect it first.
- **Macs:** the **Review** tab has the same buttons.

When to get more help

If you are locked out of an important spreadsheet, contact us as soon as possible, and avoid downloading password-cracking tools from the internet.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Advanced | 2 min read

Excel: your first pivot table

A pivot table summarises a long list in seconds. If you have hundreds of sales rows, a pivot table can show the total for each person, month or product without a single formula. Do not worry about the name, as it is far simpler than it sounds.

Prepare your data

- Make sure your list has headings in the top row, one heading per column.
- Remove blank rows and columns inside the list.
- Do not mix types, such as text in a column of numbers.
- Tip: click inside the list and press Ctrl+T to turn it into a table, which grows automatically.

Create the pivot table

1. Click any cell in your list.
2. Click the **Insert** tab, then **PivotTable**.
3. Check that the range looks right and choose **New Worksheet**.
4. Click **OK**.

If you are unsure what you want, try **Recommended PivotTables**, next to the main button. Excel suggests some layouts.

Build the summary

On the right is a pane called **PivotTable Fields**, listing your column headings. Drag them into the boxes below:

- **Rows**: what you want listed down the side, such as Salesperson.
- **Columns**: an optional second split across the top, such as Month.
- **Values**: the numbers to add up, such as Sales.
- **Filters**: an optional drop-down at the top of the report.

Try it. Put Salesperson in **Rows** and Sales in **Values**. You now see each person's total.

Change the sum

If it says 'Count of Sales' instead of 'Sum of Sales', click the heading in **Values**, choose **Value Field Settings** and pick **Sum**, **Average** or **Count**.

Update after the data changes

Pivot tables do not refresh automatically. Right-click the pivot table and choose **Refresh**, or use the **Refresh** button on the **PivotTable Analyze** tab. The tab name can vary slightly between versions.

Common problems

- **Numbers are being counted instead of added**: some cells are probably stored as text.
- **New rows are missing**: refresh it, or check the range.

When to get more help

If your pivot table gives numbers you do not trust, send us the file and we will help you check them.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

Excel: how to create a drop-down list in a cell

A drop-down list lets people pick from a set of choices instead of typing. This keeps spellings consistent, which helps when you filter, count or sum your data later.

Create a simple list

1. Click the cell, or select several cells, where you want the drop-down.
2. Click the **Data** tab, then **Data Validation**.
3. On the **Settings** tab, change **Allow** to **List**.
4. In the **Source** box, type your choices separated by commas, for example Yes,No,Maybe.
5. Make sure **In-cell dropdown** is ticked.
6. Click **OK**.

A small arrow now appears when you click the cell.

Use a list stored on the sheet

This is better for longer lists or lists that change.

1. Type your choices down a column, for example in cells H2 to H6.
2. Click the target cell, open **Data Validation** and choose **List**.
3. Click in **Source**, then click and drag over H2 to H6 on the sheet.
4. Click **OK**.

If you want the list to grow, turn it into a table first by clicking inside and pressing Ctrl+T. Using a table as the source is a bit more advanced, so ask us if you get stuck.

Show a message or a warning

- **Input Message** tab: shows a helpful hint when the cell is selected.
- **Error Alert** tab: decides what happens if someone types something not on the list. **Stop** refuses it. **Warning** and **Information** allow it after a prompt.

Remove a drop-down

Select the cell, open **Data Validation** and click **Clear All**.

Common problems

- **The arrow does not show:** In-cell dropdown might be unticked, or the sheet is protected. Click the cell to see if the arrow appears.
- **Copying and pasting removes it:** pasting a normal cell over it removes the rule, so use **Paste Special**, then **Values** to avoid this.
- **People can still type anything:** the Error Alert style is set to Warning or Information.
- **Mac:** it is the same under **Data**, then **Data Validation**.

When to get more help

If you want a list that feeds from another file or many linked lists, ask us for a hand to set it up properly.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

PowerPoint: slide master basics for consistent slides

The Slide Master is the control room of your presentation. Change a font, colour or logo there once and every slide follows. It saves you fixing slides one by one, and stops the deck looking like a patchwork.

Open the Slide Master

1. Click the **View** tab.
2. Click **Slide Master**.

On the left you will see a large slide at the top, which is the master, and smaller ones beneath it. The smaller ones are layouts, such as Title Slide, Title and Content, and Section Header. The layout names are what you see when you click **New Slide** or **Layout** on the **Home** tab.

Make a change for the whole deck

1. Click the top master slide.
2. Click the title text and change the font, size or colour on the **Home** tab.
3. To add a logo, use **Insert, Pictures**, place it and resize it.
4. Click **Close Master View** on the **Slide Master** tab.

Every slide that uses those layouts updates. If a layout does not change, it may have its own settings, so click it and adjust it.

Fonts and colours

On the **Slide Master** tab, use the **Fonts** and **Colors** buttons to choose a matching set. Using these means charts and shapes you add later will also fit in.

Change one layout only

Click the individual layout in the left list and edit it. This is useful for making the title slide look different.

If a slide ignores the master

You may have changed that slide by hand. On the **Home** tab, click **Reset** and it goes back to the layout's settings.

Tips

- Keep your fonts to two at most.
- Do your master edits before you build the slides, if you can.
- Your company may already have an approved template, so ask before creating your own.

Common problems

- **Logo missing on some slides:** check that the layout is set to show master graphics. Look for **Hide Background Graphics** in **Format Background**.
- **Mac:** the **View** menu has **Slide Master**.

When to get more help

If you have inherited a deck with a messy master, or you want a branded template made, contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

PowerPoint: how to use Presenter View

Presenter View shows you your notes, the next slide and a timer on your laptop, while the audience sees only the current slide on the big screen. It is a great way to feel prepared. It needs two screens: your laptop and a projector or display.

Connect and set up your screens

1. Plug in the projector or display.
2. Press the Windows key and P together.
3. Choose **Extend**. This makes the second screen separate from your laptop display.

If you pick **Duplicate**, your audience will see everything you see, including your notes.

Start the show

1. In PowerPoint, click the **Slide Show** tab.
2. Make sure **Use Presenter View** is ticked.
3. Click **From Beginning**.

If the screens are the wrong way round, so the audience sees your notes, click the three dots at the bottom of Presenter View and choose **Swap Presenter View and Slide Show**. The menu wording may vary slightly.

What you can do

- See your speaker notes beneath the slide. Use the text size buttons to make them bigger.
- See the next slide and a clock.
- Jump to any slide with **See all slides**.
- Use the pen, highlighter or laser pointer.
- Black or un-black the screen with the button, or by pressing B.

Add speaker notes

Click **Notes** at the bottom of the normal view (or choose **View**, then **Notes**). Type your notes under each slide.

Presenting in Teams

If you are using Teams, share the **Window** containing your PowerPoint rather than the whole screen. Our Teams screen-sharing guide explains the options.

Common problems

- **No Presenter View option**: only one display is detected. Check the cable, then Windows key and P.
- **The audience sees your notes**: screens are duplicated, or swapped.
- **Mac**: use **Slide Show**, then **Presenter View**.

When to get more help

If a projector will not connect or a room screen keeps going blank, tell us what kind of screen or cable it is and we can help before your next presentation.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

PowerPoint: file too big? How to compress images

A presentation that is too big to email is usually full of large photos. Compressing the pictures can shrink the file dramatically, often with little visible difference on screen.

Compress pictures

1. Click any picture in the deck.
2. Click the **Picture Format** tab.
3. Click **Compress Pictures**.
4. Untick **Apply only to this picture**, so that all pictures are done together.
5. Tick **Delete cropped areas of pictures**. This throws away the parts you cropped out and cannot be undone after you save.
6. Choose a resolution. **Web (150 ppi)** is a good everyday choice. **Email (96 ppi)** gives the smallest file but looks rougher if projected on a large screen.
7. Click **OK**, then save.

Check the file size

Open File Explorer, right-click the file, choose **Properties** and read the **Size** line. Compare it with the earlier number. Always keep a copy of the original for the best quality images, in case you need to print later.

Other ways to shrink it

- **Videos:** click **File**, then **Info**, and look for **Compress Media**. It only shows if the deck has video or audio.
- **Remove unused slides** and old, hidden ones.
- **Change the default:** go to **File, Options, Advanced** and look under **Image Size and Quality**. You can set the default picture resolution there.
- **Avoid pasting huge pictures:** a photo straight from a phone camera is far bigger than any slide needs.
- **Share a link instead:** upload to OneDrive or SharePoint and send a link in your email. Our guide on sharing files safely explains how.
- **Save as PDF:** if people only need to read it, a PDF is much smaller.

Common problems

- **Pictures look fuzzy:** you probably chose too low a resolution. Reopen the original and try Web (150 ppi).
- **The file is still huge:** embedded videos or fonts could be the cause.
- **Mac:** **Picture Format**, then **Compress Pictures** is in the same place.

When to get more help

If a deck is still huge or will not email, contact us. We can help you find what is making it so large.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

OneNote: the basics for beginners

OneNote is a digital notebook. It is perfect for meeting notes, to-do lists, ideas and anything you would otherwise scribble on paper. It saves itself as you type, so there is no Save button to worry about.

How it is organised

A OneNote notebook works like a real binder.

- **Notebook:** the whole thing, such as Work Notes.
- **Sections:** coloured tabs along the top, like dividers.
- **Pages:** the pages inside each section, listed at the side.

Get started

1. Open OneNote and sign in with your work or school account.
2. Click **File**, then **New** (or use the notebook menu) to create a notebook. Choose OneDrive or SharePoint if asked, so it is saved online.
3. Click the plus sign to add a section, then **Add Page**.
4. Type a title at the top of the page, and click anywhere to start typing. Unlike Word, you can put text anywhere on the page.

Useful things to try

- **Tick boxes:** on the **Home** tab, click **To Do Tag** to make a checklist.
- **Pictures and files:** use **Insert**, then **Pictures** or **File Attachment**.
- **Draw or handwriting:** the **Draw** tab has pens and highlighters. It works best with a touchscreen.
- **Headings and bullets:** use the **Home** tab, like Word.
- **Search:** press Ctrl+E to search every page.

Share a notebook

Click **Share** at the top right, type the person's name, choose whether they can edit or only view, and send. Then you can work together on the same pages.

Where are my notes?

If your notebook lives on OneDrive or SharePoint, you can open it on a phone, tablet or the web, using the same sign-in. On the web, go to the Microsoft 365 home page and look for OneNote.

Common problems

- **Notes look out of date:** check the sync status by clicking the **Sync** icon. A notebook saved only on one device will not appear elsewhere.
- **OneNote has several versions:** the older one can look different. Ask us if your screen does not match.

When to get more help

If a notebook will not sync or you think notes have gone missing, do not delete anything and contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

Outlook: how to create rules to sort your email

Rules tell Outlook what to do with certain emails automatically. They can move newsletters to a folder, flag messages from your boss, or play a sound for something important. A few good rules can keep your inbox calm.

Outlook comes in a few versions, such as the classic desktop version and the newer one, and menu names differ slightly. If something does not match, look for the **Rules** option under **Home** or in **Settings**.

Quick way in classic Outlook

1. Right-click an email from the sender you want to deal with.
2. Choose **Rules**, then **Create Rule**.
3. Tick **From** (with the sender's name) and choose **Move the item to folder**.
4. Pick a folder or create a new one, then click **OK**.

If you wish, tick **Run this rule now on messages already in the current folder**.

Make a rule from scratch

1. On the **Home** tab, click **Rules**, then **Manage Rules & Alerts**.
2. Click **New Rule**.
3. Choose a template such as **Move messages from someone to a folder**, then follow the steps. Click the blue underlined words to fill them in.
4. Name the rule and click **Finish**.

In the newer Outlook or Outlook on the web

Click the **Settings** cog, then **Mail**, then **Rules**, and choose **Add new rule**. Pick a condition and an action, then save.

Ideas for good rules

- Move newsletters or notifications to a folder.
- Flag emails from certain people.

Be careful

- Never create a rule that deletes mail permanently unless you are certain.
- If you did not make a rule that forwards or deletes your mail, it could be a sign of a hacked account. Change your password and contact us at once.

Common problems

- **A rule does not run:** it may be switched off or too specific. Check the box next to it in **Manage Rules & Alerts**.
- **Mail goes missing:** look in the folder the rule moves things to, and in **Junk**.

When to get more help

If email is disappearing into the wrong folder or you suspect someone else has set up a rule, contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Outlook: how to share your calendar

Sharing your calendar lets colleagues see when you are free, which makes arranging meetings much easier. You choose how much they can see, and you can stop sharing at any time. You can share with people inside your organisation, and sometimes outside it if your administrator allows.

Outlook has a few versions and the menu words differ a bit, so look for the same ideas if your screen looks different.

Share in classic Outlook

1. Click the **Calendar** icon at the bottom left.
2. On the **Home** tab, click **Share Calendar**. If you have several calendars, choose the right one.
3. Type the person's name or email address in the **To** box.
4. Choose how much detail they get, such as:
 - **Can view when I'm busy** shows only free or busy.
 - **Can view titles and locations** shows the subject and place.
 - **Can view all details** shows everything.
 - **Can edit** lets them change your calendar.
5. Click **Send**.

The person gets an email asking them to accept and add your calendar next to theirs.

Share in the newer Outlook or on the web

Right-click your calendar in the left list, choose **Sharing and permissions**, add the person and select the level. The exact wording may vary.

Check who can see your calendar

Open the same sharing screen to see everyone listed. To remove somebody, select their name and choose **Remove**.

Mark private appointments

When you create an event, click **Private** so that others only see 'Busy', even if they have more access.

Tips

- For most colleagues, **Can view when I'm busy** is enough.
- Give **Can edit** only to someone you really trust, like an assistant. For a manager and assistant arrangement, delegate access (see our guide) is better.

Common problems

- **They cannot see it:** they may not have accepted the invitation yet.
- **You cannot share outside the company:** your administrator may block it.
- **Mac:** the sharing options are in a slightly different place, so ask us if you cannot find them.

When to get more help

If sharing is greyed out or not working, we may need to check your account settings, so contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Advanced | 2 min read

Outlook: how to give someone delegate access

Delegate access lets someone else, such as an assistant, manage part of your mailbox or calendar on your behalf. They can read your emails, reply for you, or accept meetings, and you decide exactly what they can do. Emails they send can say 'sent on behalf of' you.

When is it right?

- Delegate access suits a manager and an assistant.
- A **shared mailbox** is better for a team address like info@ or sales@. See our guide on shared mailboxes.
- Sharing your calendar for viewing is simpler if people only need to see when you are free. See our calendar sharing guide.

Add a delegate in classic Outlook

1. Click **File**.
2. Click **Account Settings**, then **Delegate Access**.
3. Click **Add**, then choose the person from the list and click **OK**.
4. In the permissions box, choose a level for each of **Calendar**, **Inbox**, **Tasks**, **Contacts** and **Notes**. Levels include **None**, **Reviewer** (can read), **Author** (can read and create) and **Editor** (can read, create and change).
5. Decide whether to **Automatically send a message to delegate** and whether to keep items private.
6. Click **OK**.

The delegate then opens your mailbox or folder through their own Outlook. Changes may take a short while to take effect.

What if I cannot find it?

In the newer Outlook or on the web, the option may be in a different place or under your account settings, and some organisations let only administrators set it up. If you cannot find it, ask us.

Remove a delegate

Open the **Delegate Access** box again, select the name and click **Remove**.

Good practice

- Give the least access needed. **Reviewer** is plenty for many people.
- Do not give anyone access to your Inbox unless they really need it, since it may hold private emails. Mark such emails **Private**.

Common problems

- **Delegate cannot see the mailbox:** they might need to restart Outlook and add your mailbox in their settings.
- **Option is missing:** you may be using a different type of account.

When to get more help

If you are not sure whether to use a delegate, shared mailbox or calendar sharing, contact us and we will recommend the safest option.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

Outlook: search is not working or finds nothing

If Outlook says there are no results for an email you know is there, do not panic. The email is almost certainly still there, and the search just needs a nudge. Work down the steps below and stop when it works.

Step 1: check where you are searching

Click in the search box at the top. Look for a choice such as **Current Folder**, **Current Mailbox** or **All Mailboxes**. If you are searching only the folder you are in, change the choice to **Current Mailbox**.

Step 2: look for the 'try again' link

Outlook sometimes shows only some results. At the bottom of the results, click a link such as **Try again to include results from the server** or **More**. Older emails can then appear.

Step 3: restart

Close Outlook completely and reopen it. Then restart the computer, which fixes many oddities.

Step 4: check how much mail is stored on your computer

In classic Outlook, click **File**, **Account Settings**, **Account Settings**, then select your account and click **Change**. Look for the slider under **Mail to keep offline**. If it is set to a short period, older mail is searched on the server and may be slower or missing. Setting it to **All** brings it all to your computer, but needs disk space.

Step 5: rebuild the Windows search index

Classic Outlook relies on Windows search. Open **Settings**, then **Privacy & security**, then **Searching Windows**, and choose **Advanced indexing options**. Click **Advanced**, then **Rebuild**. It can take hours, and search may be patchy until it finishes. Leave your computer on.

Step 6: check for add-ins

Hold the Ctrl key while opening Outlook and answer **Yes** to start in safe mode. If search works, an add-in is likely the cause and we can help find it.

Tips

- Search for a sender with the **From** filter in the search bar for faster results.
- If your mailbox is very large, search can be slow while Outlook is syncing.

When to get more help

If search is still empty after a rebuild, or emails really seem to be missing, contact us before deleting or reinstalling anything.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Teams: chat or channel? Which one to use

Teams has two main ways to talk to people, and choosing the right one keeps conversations tidy. In short, use a chat for private conversations and a channel for team topics that others may want to see.

Chats

A chat is a private conversation between you and one or more named people.

- Only the people in the chat can see it.
- It suits quick questions, one-to-one messages and small group discussions.
- To start one, click **Chat** on the left, then the **New chat** button (a pencil and paper icon), and type a name.
- Meeting chats also appear here.

Teams and channels

A team is a group of people, such as Sales or Office Admin. Inside it are channels, each for a subject, such as Rotas or Customer Queries.

- Everyone in a standard channel can read it, including people who join later.
- Files shared in the channel are stored with it, under the **Files** tab at the top of the channel.
- You can pin tabs for useful things, such as a Planner board.
- To post, click **Teams** on the left, pick a channel, and choose **New post** or the type-a-message box.

Good habits

- **Reply in the thread** rather than starting a new post. Click **Reply** under the message so everything stays together.
- **Use @mentions** to get someone's attention. Type @ followed by the name or **@channel** to alert a whole channel. Use that last one sparingly.
- **Keep private matters in chat**, such as HR, pay or anything sensitive. Do not put it in a channel.
- **Choose the right channel** and avoid posting the same thing in several.

Finding things

Use the search box at the top of Teams. You can also click the **Activity** icon on the left to see mentions and replies.

Private channels

A team owner can create private channels, visible only to selected people. If you need one, ask the team owner.

Common problems

- **I cannot see a team:** you may not have been added. Ask the team owner.

When to get more help

If you need a new team set up, or people are seeing things they should not, contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Medium | 2 min read

Teams: how meeting recordings and transcripts work

Teams can record a meeting and write a transcript of what was said. This is handy for people who could not attend, but it needs a few things to be right. Some of it depends on your licence and on settings chosen by your organisation, so the buttons may not be available to everyone.

Start a recording

1. In the meeting, find the meeting controls at the top.
2. Click **More actions**, which looks like three dots.
3. Choose **Record and transcribe**, then **Start recording**. The wording can differ slightly between versions.
4. Everyone in the meeting is told that recording has started. It is polite and sometimes a legal requirement to tell attendees first.

To finish, use the same menu and choose **Stop recording**. Recording also stops when everyone leaves.

Start a transcript

In the same menu, choose **Start transcription**. The transcript appears at the side. It can be started without recording, and the other way round.

Where do recordings go?

Recordings are saved to **OneDrive** or **SharePoint**, not on your computer. For an ordinary meeting, the recording usually goes to the OneDrive of the person who started it. For a channel meeting, it goes to that team's SharePoint area. After a short wait, a link usually shows in the meeting chat.

Who can watch it?

By default, people invited to the meeting get access, but this depends on settings. To share with others, open the file in OneDrive or SharePoint and use **Share**. See our guide on sharing files safely.

Things to know

- Recordings can be set to delete automatically after a set number of days. Your administrator decides this, so download or move anything you must keep.
- Only people with the right permissions can start recording. If the option is missing, you may not be allowed, or your admin may have turned it off.

Common problems

- **No recording link**: wait a few minutes, then check your OneDrive **Recordings** folder.

When to get more help

If a vital recording has gone missing or you need recording turned on, contact us promptly because deleted files can only be restored for a limited time.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Teams: how to control notifications

If Teams pings you all day, or you miss important messages, you can adjust it. A little setup means you hear about what matters and the rest waits until you are ready.

Teams updates its design from time to time, so menus may look slightly different from the steps here.

Open the notification settings

1. Click the three dots next to your profile picture at the top right.
2. Choose **Settings**.
3. Click **Notifications and activity**.

You will see sections such as **Chat**, **Teams and channels**, **Meetings** and **Mentions**. For each, you can choose how you are told. **Banner** pops up on the screen, and **Feed** shows in the **Activity** area only. Some options also send an email.

Quieter, but not silent

A sensible setup is:

- Keep banners for direct chats and @mentions.
- Turn down general channel posts so you only see them in the feed.
- Turn off sounds if they bother you, using the choices in the same area.

Mute one noisy chat or channel

- **Chat**: hover over it in the list, click the three dots, and choose **Mute**.
- **Channel**: hover over the channel name, click the three dots, choose **Channel notifications**, and pick which activity you want to hear about.

Use your status

Click your profile picture and set your status to **Do not disturb** during a meeting or when focusing. Choose **Duration** to set how long. You can still see what you missed afterwards.

Windows has its own **Do not disturb** switch in the notification area, and this can also hide Teams banners. If you miss them unexpectedly, check that too.

Getting too few notifications

- Check that **Do not disturb** is off.
- Check that notifications are allowed for Teams in Windows **Settings**, **System**, **Notifications**.
- On your phone, check the settings for the Teams app.

Mobile

Open the Teams app, tap your picture, and choose **Notifications**. You can set quiet hours there.

When to get more help

If you are still missing messages on your phone or computer, contact us so we can check the settings with you.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Microsoft Forms: how to make a survey or quiz

Microsoft Forms lets you build a survey, sign-up sheet or quiz, send a link, and see the answers collected for you. It is included with most Microsoft 365 plans, and people can answer on a phone or computer.

Microsoft updates the look from time to time, so buttons may be in slightly different places.

Create a form

1. Sign in to Microsoft 365 in your web browser, open the app launcher (the grid of dots at the top left), and choose **Forms**. If you do not see it, search for it.
2. Click **New Form** (or **New Quiz** for scored questions).
3. Click the title and give it a name. You can add a short description under it.
4. Click **Add new** and choose a question type, such as **Choice**, **Text**, **Rating** or **Date**.
5. Type the question and, for a choice question, the answers.
6. Use the **Required** switch for questions people must answer.

Preview it

Click **Preview** at the top to see how it looks on a computer and a phone. Fill it in yourself to test it.

Share it

1. Click **Collect responses**, or **Share**.
2. Choose who can answer: **Anyone can respond**, or only **People in my organization**. The second option is safer for staff forms.
3. Copy the link and send it by email or Teams, or use the QR code.

See the results

Click the **Responses** tab. You will see charts, and you can click **Open results in Excel** for a spreadsheet of all answers.

Be careful

- Never ask for passwords or card numbers.
- If you collect personal details, tell people why and keep the data safe. This is a UK GDPR matter.
- Think about whether you need names. Anonymous responses can get more honest answers.

Common problems

- **People cannot open it:** check the setting for who can respond.
- **Answers missing:** make sure the form is still accepting responses. This is a setting under the three dots.

When to get more help

If you need a form that handles personal data or payments, contact us before you send it out.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.

Word, Excel & Microsoft 365 | Easy | 2 min read

Microsoft Planner: how to organise tasks with your team

Planner is a simple board for tracking who is doing what. Tasks sit on cards in columns, a bit like sticky notes on a wall. It suits small projects, rotas, event planning and anything where a shared to-do list helps.

Microsoft has been merging Planner with other task tools, so names and screens may look different on your account. The ideas stay the same.

Open Planner

Sign in to Microsoft 365 in your browser, click the app launcher (the grid of dots) and choose **Planner**. In Teams, you can also find it by clicking **Apps** on the left, or as a tab in a channel. Ask us if you cannot find it.

Make a plan

1. Click **New plan** (or the + button).
2. Give it a name, such as Spring Open Day.
3. Choose whether it is private or visible to your team, if asked, and click **Create**.

Add columns (buckets) and tasks

- **Buckets** are columns, such as To do, Doing and Done. Click **Add new bucket** to add one.
- Click **Add task**, type what needs doing, and press Enter.
- Click a task to open it. You can:
 - **Assign** it to one or more people.
 - Set a **Due date**.
 - Add a **Checklist** of smaller steps.
 - Add **Notes** and attach files.

Move work along

Drag a task card from one bucket to the next. When it is finished, open the card and mark it **Complete**.

Different views

Along the top you can switch between the **Board**, a **Grid** list, a **Schedule** calendar and **Charts** that show progress. Which of these appear depends on your version.

Invite people

Click the **people icon** or **Members** and add names. They can then see and change tasks.

Tips

- Keep task names short and clear, starting with a verb, such as 'Book room'.
- Review the plan weekly so it does not go stale.

Common problems

- **I cannot find my plan:** look under **Recent** or **Shared with me**.

When to get more help

If you are deciding between Planner and a bigger tool, or need help setting up for a team, contact us.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.