

20 Microsoft 365 Productivity Tips...



...You NEED to Know!

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Please thank our sponsors





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Some of my community activities:

- Weekly interviews on technology, business productivity, and collaboration culture ([#CollabTalk Podcast](#))
- Weekly livestream on project management best-practices ([#ProjectFailureFiles](#))
- Weekly interviews with Microsoft MVPs ([#MVPbuzzChat](#))
- Monthly livestream of the Guardians of M365 Governance ([#GoM365gov](#)) covering all-things governance
- Multiple posts each month with a panel of experts answering community questions ([#M365AMA](#))
- Monthly tweetjams & livestreams via X ([#CollabTalk](#))





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Let's get started!

1. Instantly Make the Settings Gear Icon Appear in SharePoint

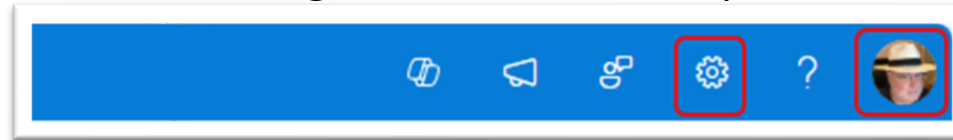


One of my colleagues in the Microsoft 365 world posted this on his blog today, and it makes me so happy... When you are going to a SharePoint site, often the **Settings Gear icon** in the upper-right corner takes 5 to 10 seconds to load. That is a pain when you really just want to get to permissions or site contents. But with this little hack, you can get the gear to show up instantly with a single click. Here's how that works...

When you first go to a SharePoint site, you'll often see this... your profile icon, but nothing else for 5 to 10 seconds:



However, if you click on your profile icon, the **Settings Gear icon** shows up immediately:



If you're spending a lot of time navigating SharePoint sites and you need to go to Settings, this little hack will save you a lot of time and frustration!

To be clear, Microsoft really needs to fix the issue with that loading so slowly. But until then, this will allow you to keep working without getting irritated... at least for that reason. :)

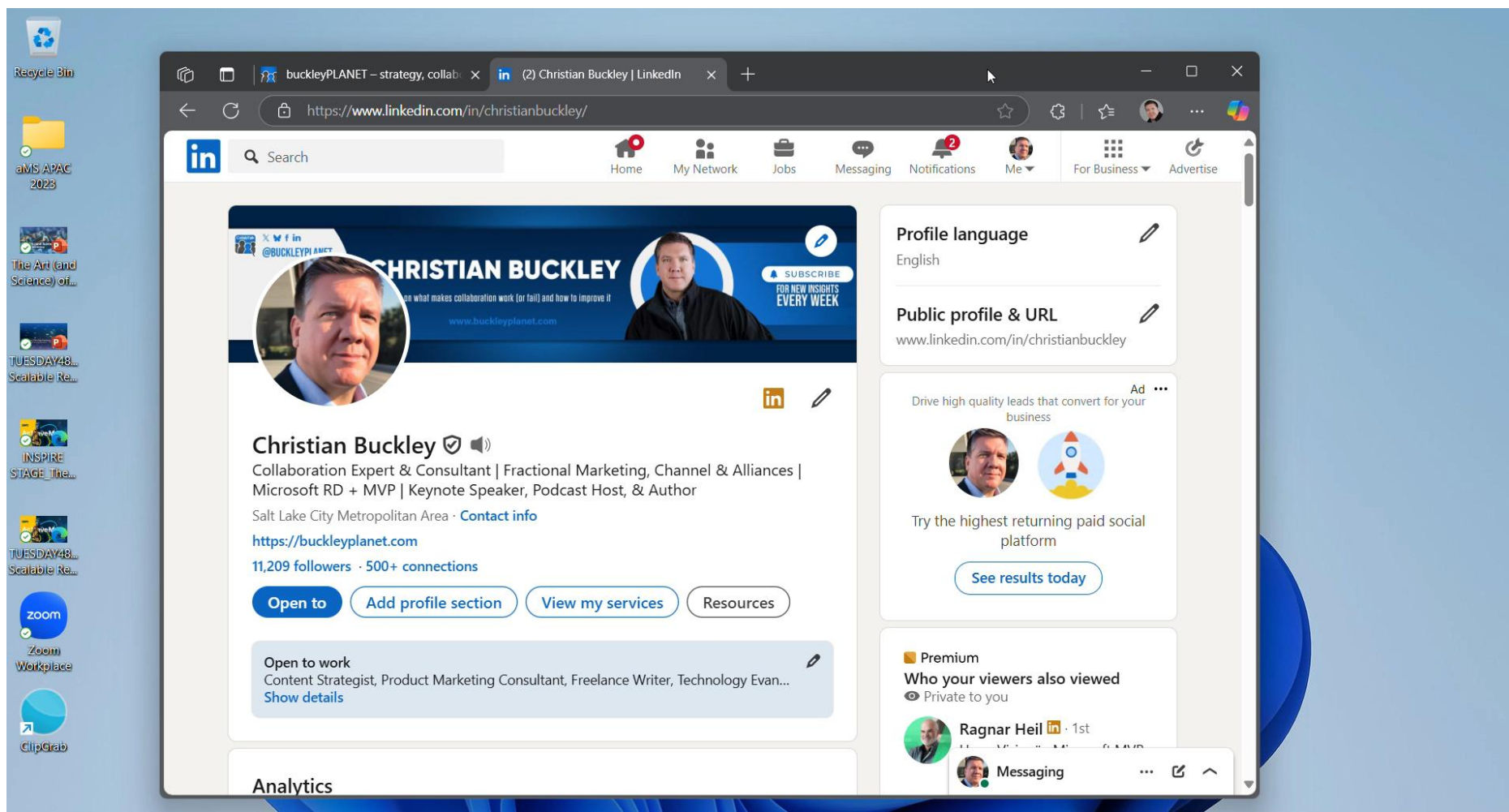
[Instantly Make the Gear Appear In SharePoint](#) from Marc Anderson

2. Split Screen like a pro...in Windows *and* Edge



If you're juggling multiple apps or browser tabs, Split Screen is your best friend for staying productive.

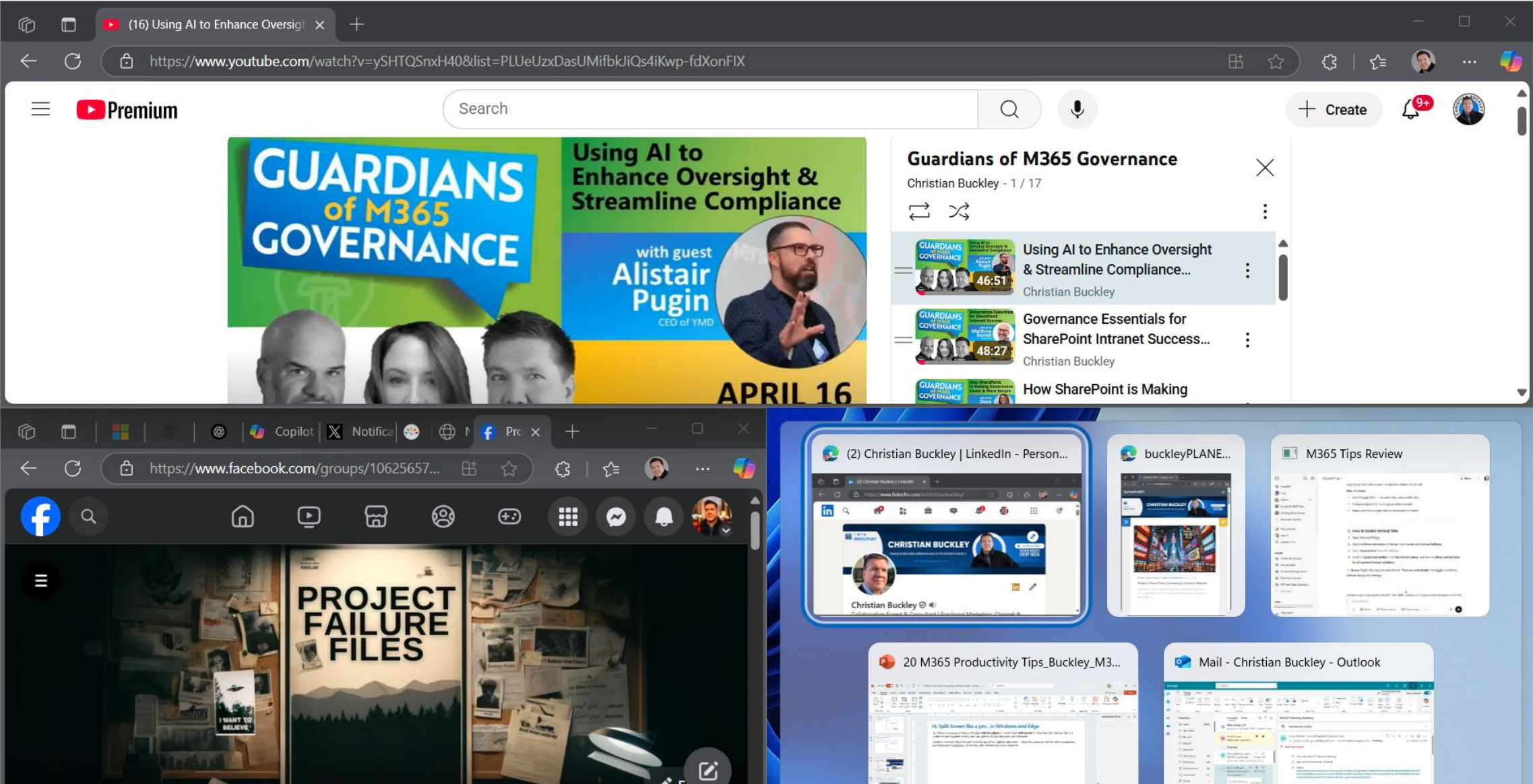
To split your screen in Windows, press **Windows Key + Left/Right Arrow** to snap the active window to one half of the screen. You'll see thumbnails of your other open apps — click one to fill the other side. Use the divider bar to adjust the width of each pane. And it works across multiple monitors!



2. Split Screen like a pro...in Windows *and* Edge



In fact, you can split your screen into quads, split two screens horizontally, or have one screen horizontal with two quads.



2. Split Screen like a pro...in Windows *and* Edge



To split your browser, in Microsoft Edge **click the ellipsis (⋮)** and select **Split Screen** to view two tabs side-by-side in a single browser window. In fact, you can split each Edge tab within your browser.

Combine this with Windows Split View for up to four side-by-side views — ideal for research, side-by-side comparisons, participating in tweetjams, or writing while referencing source material.

The screenshot displays a Microsoft Edge browser window with a split-screen layout. The main content area shows a YouTube video player for the video "Using AI to Enhance Oversight & Streamline Compliance (#GoM365gov Ep.16)" by Christian Buckley. The video player includes a thumbnail with the text "GUARDIANS of M365 GOVERNANCE" and "with guest Alistair Pugin CEO of YMD". The video is at 0:02 / 46:50. To the right of the video player is a sidebar with a list of related videos, all from the "Guardians of M365 Governance" series. The browser tabs at the top include "(16) Using AI to Enhance Oversight...", "Smarter Consulting - Home", "Microsoft 365 Blog | Latest Product Updates", and "New tab". The address bar shows the YouTube URL. The bottom of the page shows video statistics: 1.5K views, streamed 2 weeks ago, and a description snippet.

2.5 Battle “tab fatigue” with Vertical Tabs in Edge

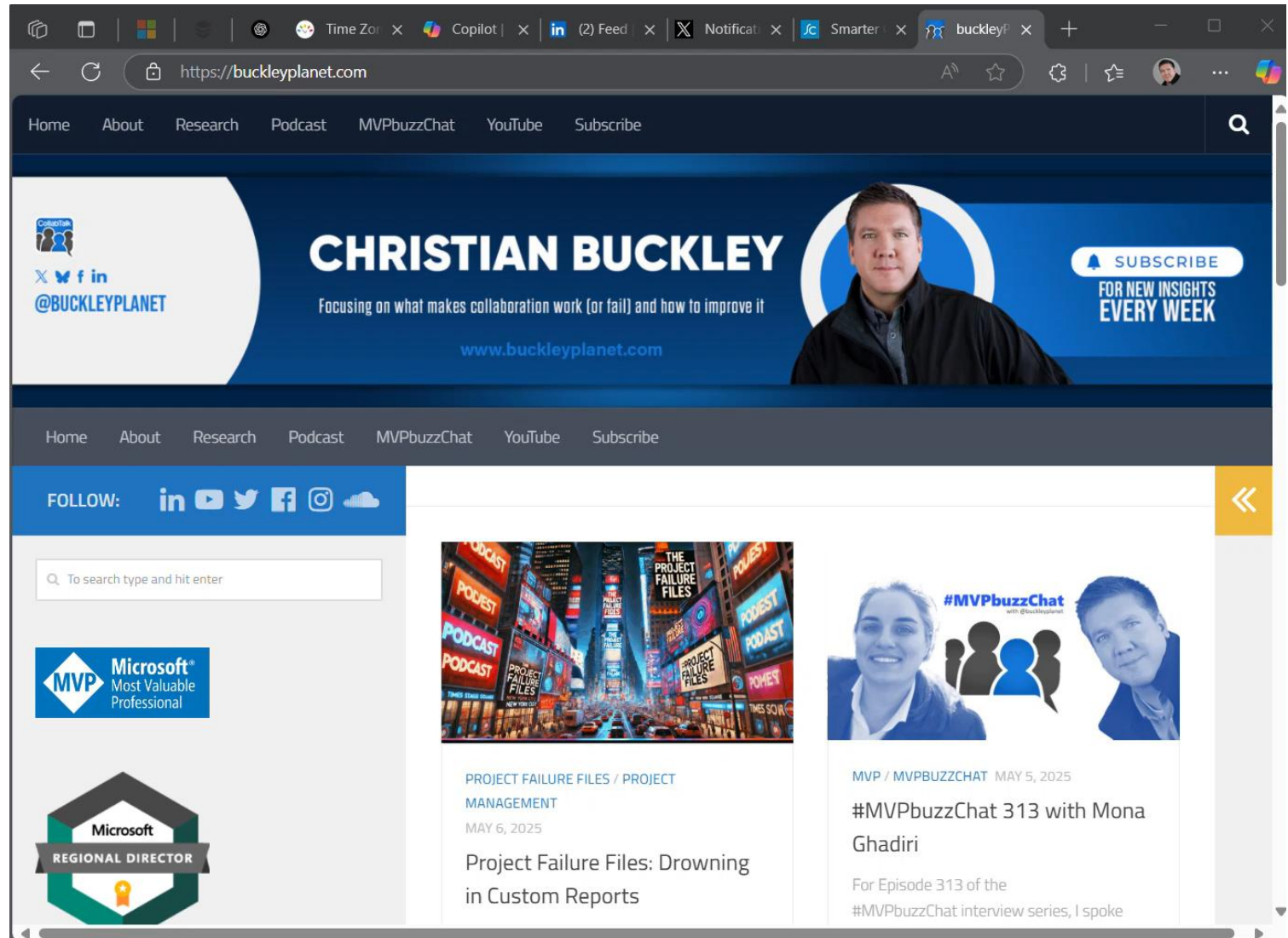


If you’ve ever had 20+ tabs open and couldn’t find what you were looking for — you’re not alone. Edge’s Vertical Tabs feature helps you manage tab overload by organizing them into a clean, collapsible sidebar on the left.

Why it’s better:

- See full page titles — no more tiny, unreadable tabs.
- Collapse/expand for more space when needed.
- Keeps your focus organized across projects or tasks.

You can enable the side tabs by **clicking the ellipsis (...)** and going to the **Settings** menu, where you’ll select **Appearance** and go into the **Tab Action** menu. From there, “turn on” **Show vertical tabs for all current browser windows**.

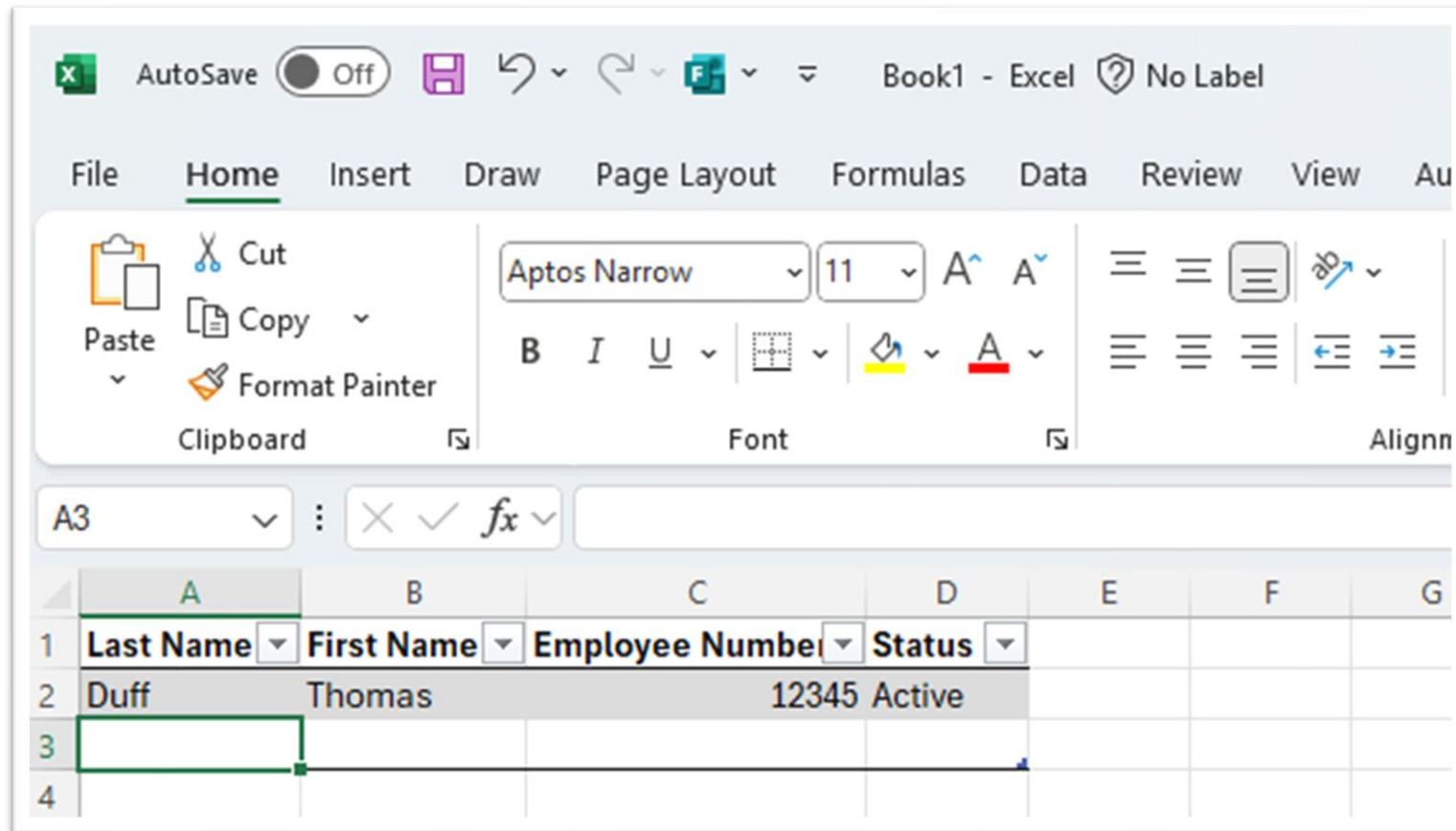


3. Using a Data Entry Form in Microsoft Excel



Here's a new one I just learned about today... When entering data into an Excel table, I was used to just adding data to the cell, tabbing to the next cell, and repeating until I was done. If the table required horizontal scrolling, it could get a bit cumbersome. But then I learned you can use the built-in **Data Entry Form** in Excel to enter that data. Here's how that works...

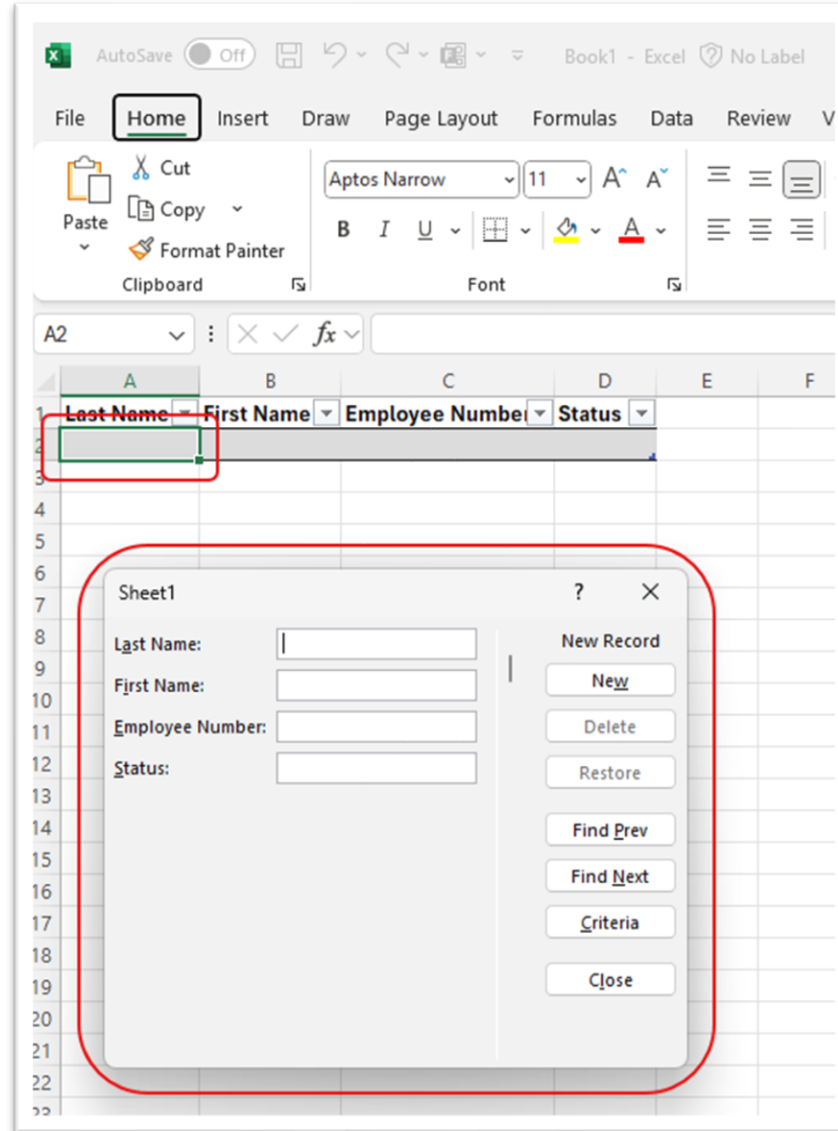
Here I have my table and what it would look like if I were entering the data directly into the rows:



3. Using a Data Entry Form in Microsoft Excel



Instead, I created my table, put my cursor in the first empty cell of the table, and used the keyboard shortcut of **ALT + D + O**. Up pops the data entry form for the table:



3. Using a Data Entry Form in Microsoft Excel



Now I can enter the data in a form format, and press ***Enter*** when I fill in the last field:

A screenshot of the Microsoft Excel Data Entry Form for 'Sheet1'. The form is displayed over a grid background. It contains four input fields: 'Last Name' with the value 'Duff', 'First Name' with 'Thomas', 'Employee Number' with '12345', and 'Status' with 'Active'. To the right of these fields is a vertical column of buttons: 'New Record' (with a 'New' sub-button), 'Delete', 'Restore', 'Find Prev', 'Find Next', 'Criteria', and 'Close'. The form has a title bar with 'Sheet1', a question mark icon, and a close button (X).



3. Using a Data Entry Form in Microsoft Excel

The row in the table is filled in with the form data, and I'm ready to enter the next row of data:

The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The ribbon includes 'Clipboard', 'Font', and 'Paragraph' groups. The active cell is A2, containing the text 'Duff'. The formula bar shows 'Duff'. Below the ribbon, a table is visible with the following data:

	A	B	C	D	E	F
1	Last Name	First Name	Employee Number	Status		
2	Duff	Thomas	12345	Active		
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
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15						
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17						
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21						
22						
23						

Overlaid on the table is a 'Sheet1' dialog box with the following fields and buttons:

- Last Name:
- First Name:
- Employee Number:
- Status:
- New Record:
- Delete:
- Restore:
- Find Prev:
- Find Next:
- Criteria:
- Close:

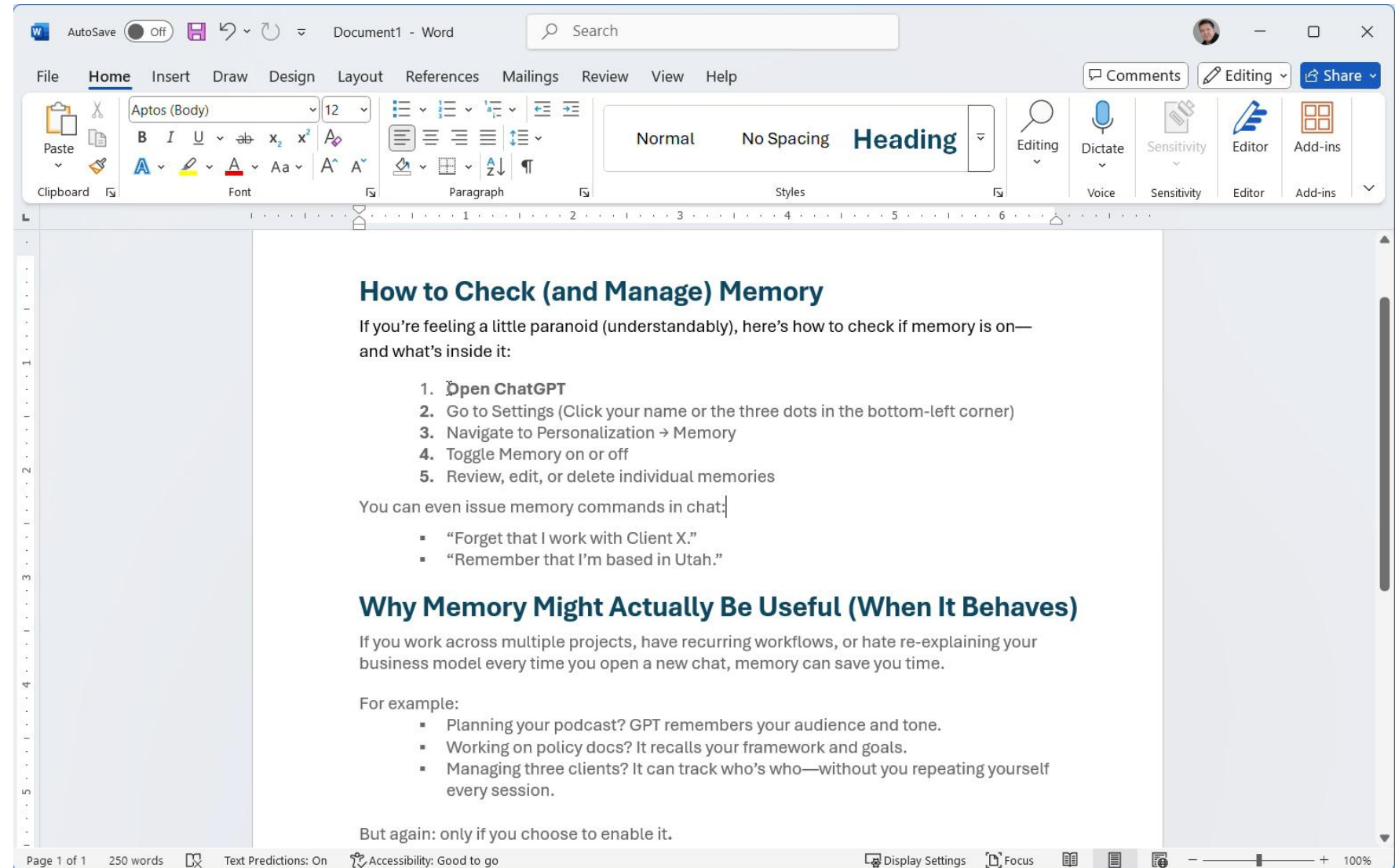
Give this approach a try next time you're finding the data entry process in an Excel table to be a bit cumbersome...

4. 'Pin' the Format Brush

We are all familiar with the **format brush**. Highlight the format you wish to duplicate, click on the format brush, and add that format to any other area.

Need to format multiple items? **Double-click** on the format brush to hold onto that format and change as many items as you'd like.

To turn it off, click on the format brush one last time.

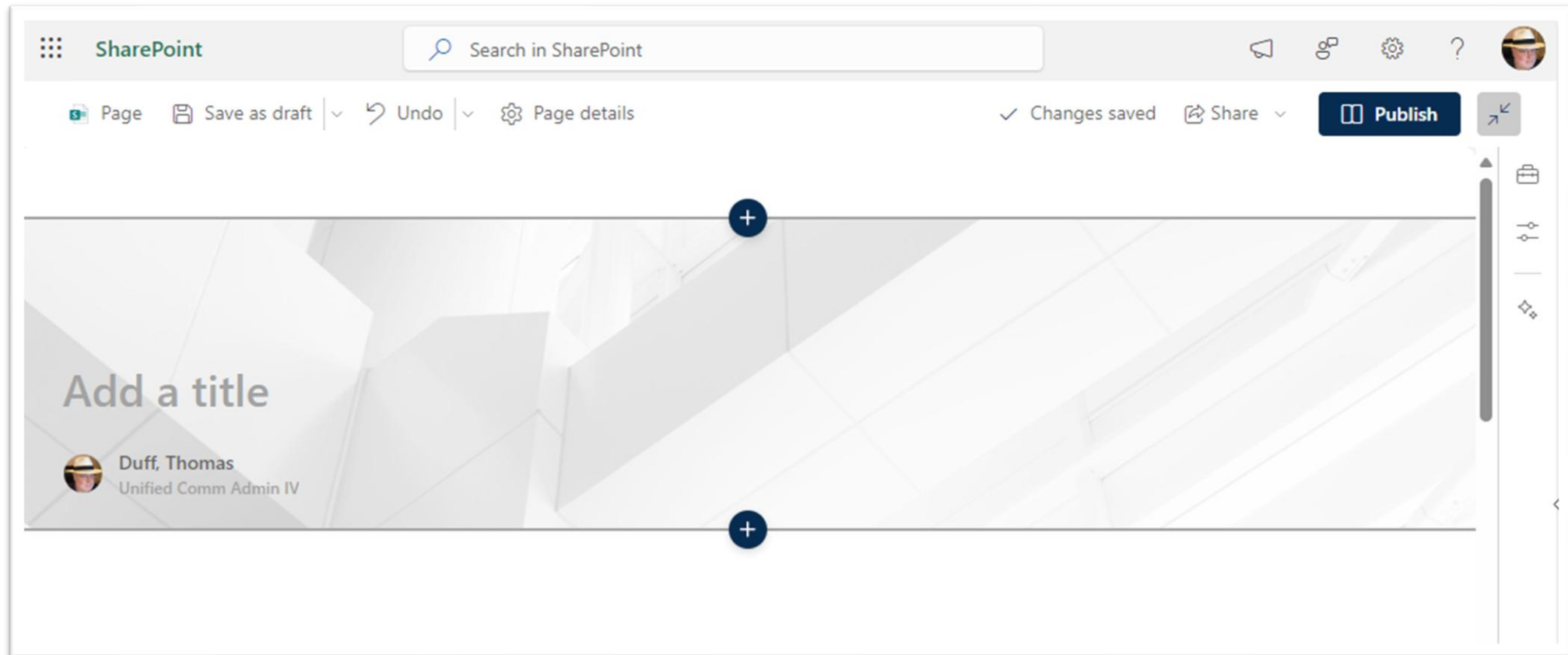


5. Removing the Header section from a SharePoint page



This is a good tip that Sandra sent my way... Have you ever wanted to create a SharePoint page that didn't have the normal page header at the top? It had been possible with using some hacks and workarounds, but now you can do it as part of editing your page in the browser. Here's how that works...

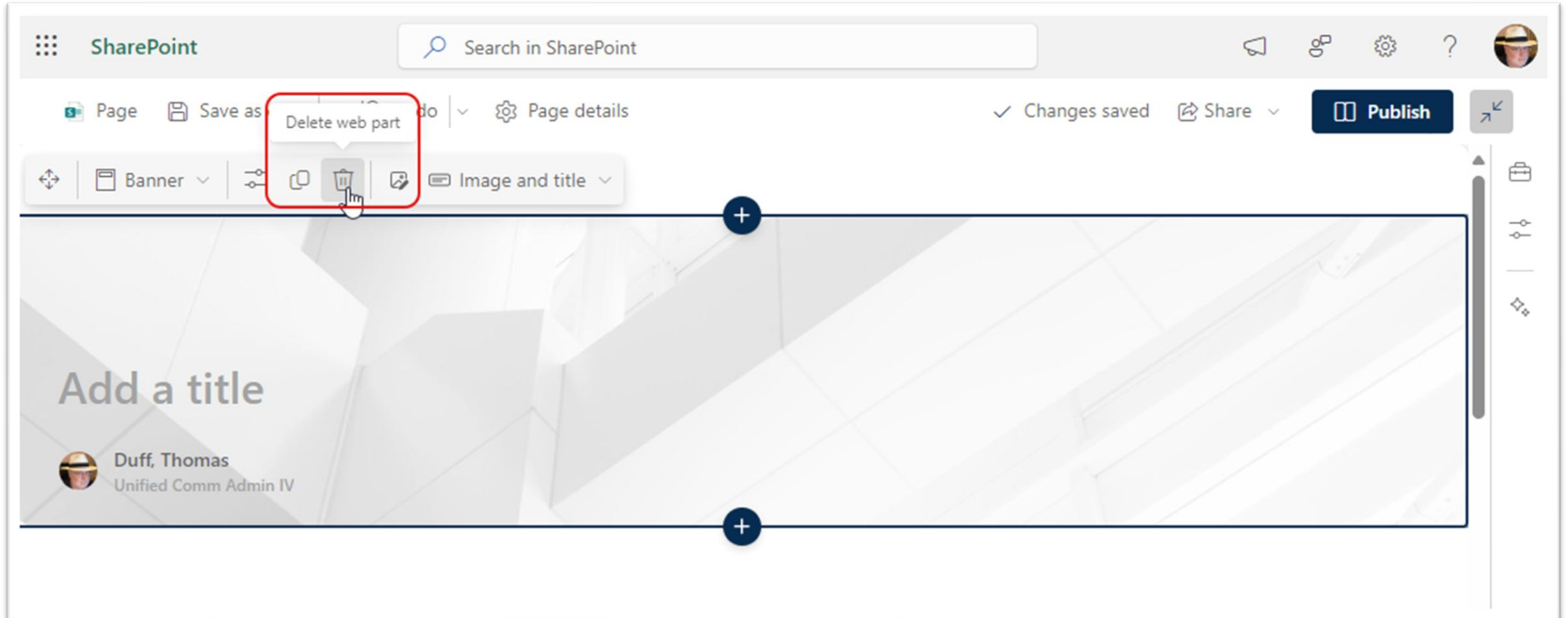
Here's a normal starting point for a page in SharePoint. At the top, you have the Title section of the page, and that's what we want to get rid of:



5. Removing the Header section from a SharePoint page



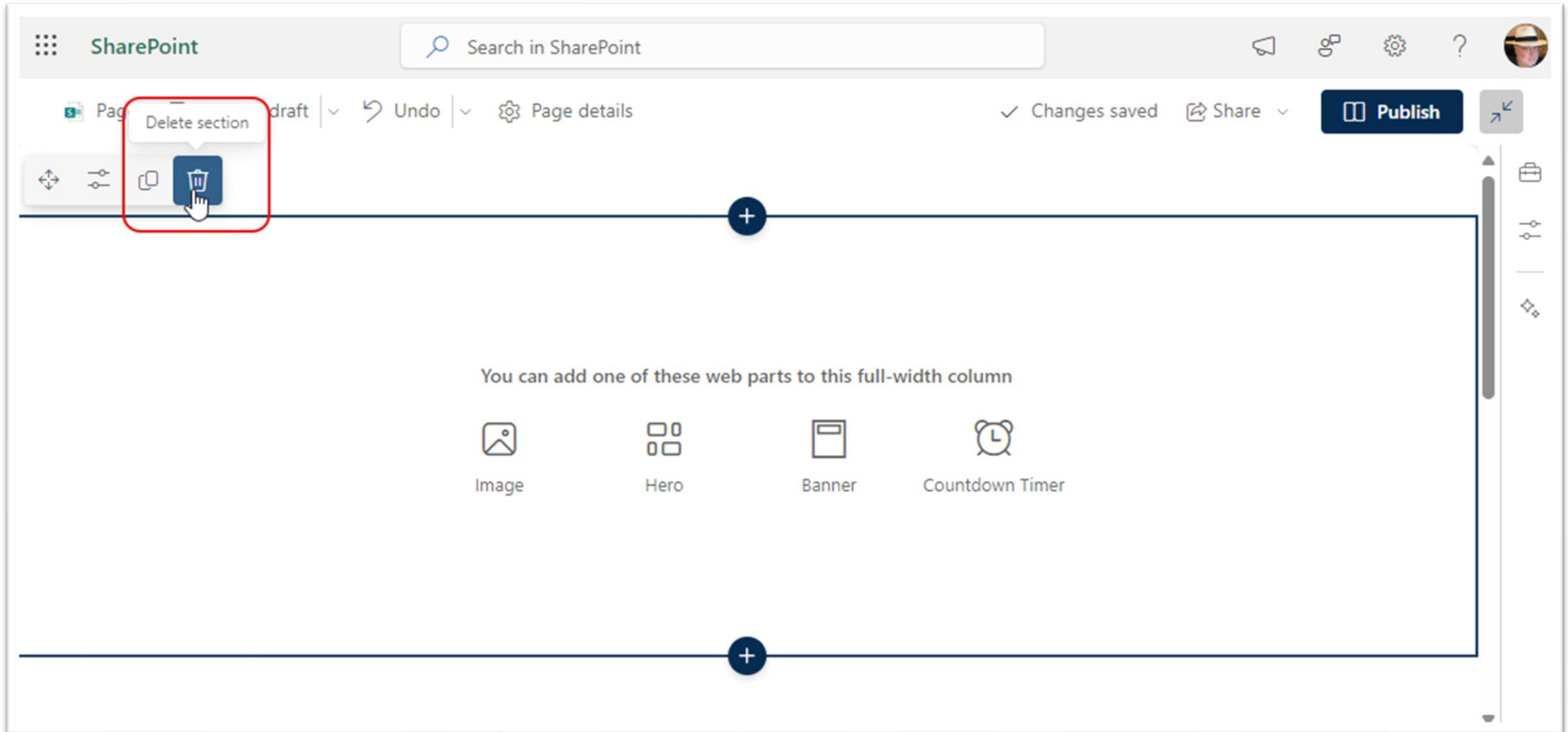
Click within the web part and click the **Delete** icon:



5. Removing the Header section from a SharePoint page



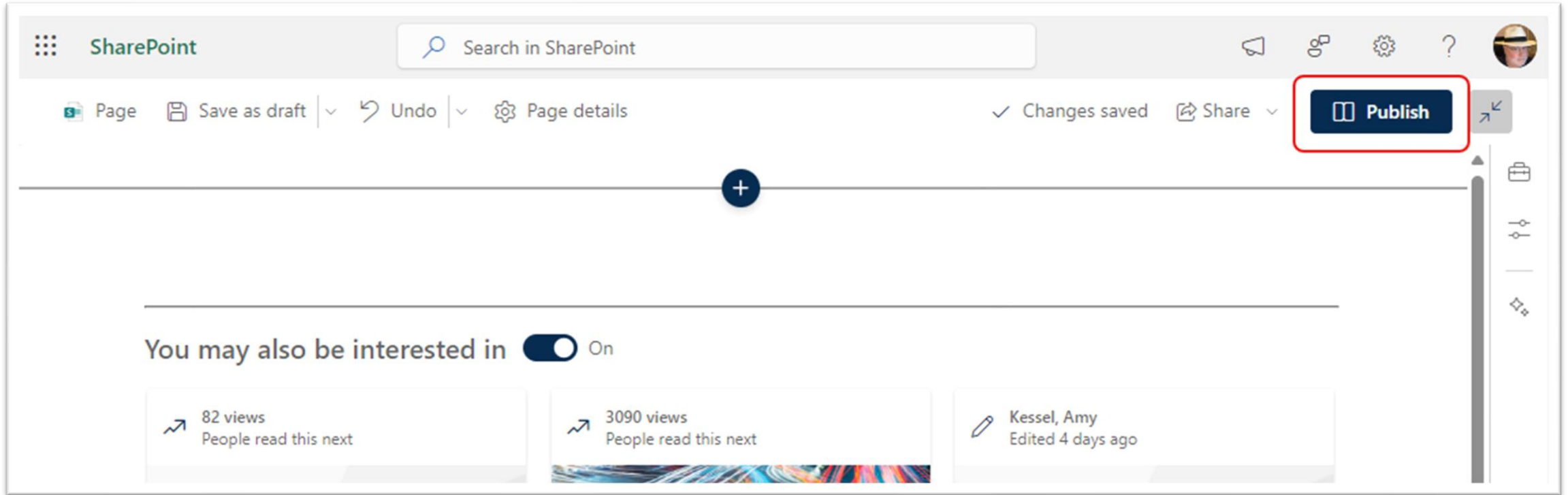
The web part is now gone. Next, we need to delete the entire full-width section. Click into the section and then click the **Delete** icon:



5. Removing the Header section from a SharePoint page



The Title section of the page is now gone! You can now click ***Publish***:



5. Removing the Header section from a SharePoint page



Normally, the page title comes from the area you just deleted. Since the page needs a title for use in the page URL, you are asked to provide a page title. Click **Close** on the pop-up box:

A white rectangular pop-up dialog box with a thin grey border. At the top left, the text "Add a page title to continue" is displayed in a dark blue font. To the right of this text is a small grey "X" icon. Below the title, a smaller line of text reads: "The page title you create will be used in the page's URL." In the bottom right corner, there is a dark blue button with the word "Close" in white text. The button is highlighted with a red rectangular border.

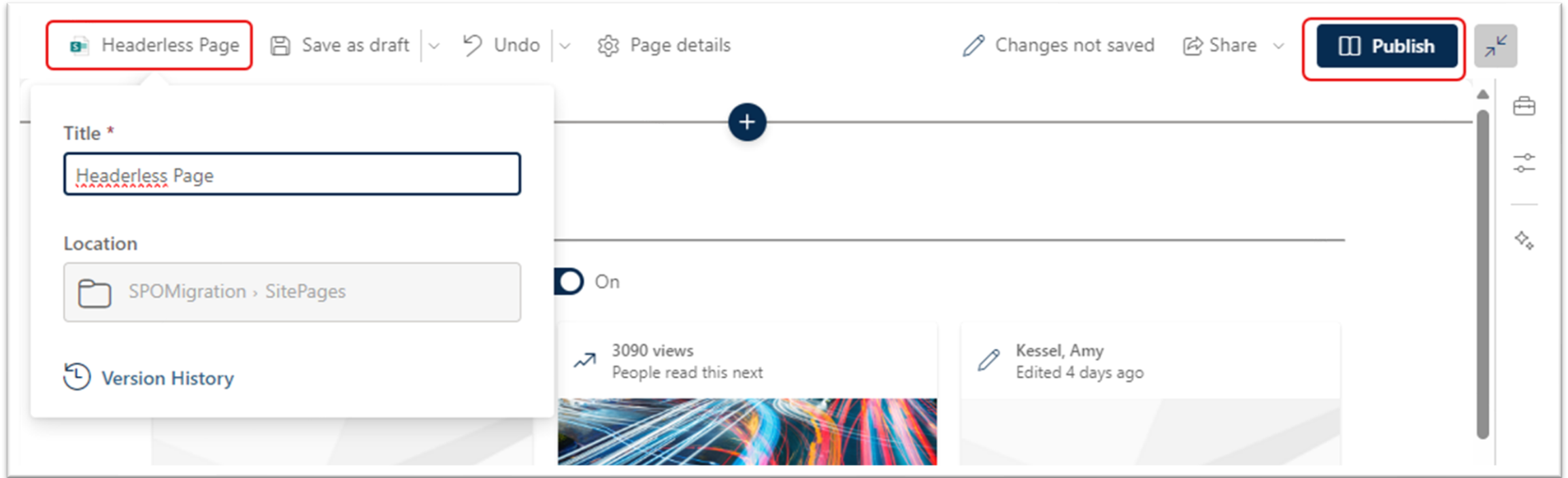
In this panel, you can put the page title you want it to be:

A white rectangular panel with a thin grey border. At the top, there is a section labeled "Title *" in dark blue. Below this label is a text input field with a dark blue border, containing the word "Page". Below the input field, there is a section labeled "Location" in dark blue. Below this label is a light grey button with a folder icon and the text "SPOMigration > SitePages". At the bottom of the panel, there is a link labeled "Version History" in dark blue, preceded by a circular arrow icon.

5. Removing the Header section from a SharePoint page



The new title of the page is in the ribbon bar ("Headerless Page"), and you can now click **Publish** again:



And in the URL of the page, you can see the page name you selected:



Thanks to Joao Ferreira for the post that he made on this topic: [How to Hide the SharePoint Page Title in a Modern SharePoint Page](#)

6. Using the Fact Check List pattern



Copilot can help in many areas—but can you trust its answers?

This prompt pattern helps validate the accuracy of Copilot responses by explicitly asking Copilot to list the facts it used to generate its answer. This improves transparency and gives you a way to independently verify the content.

To begin fact validation, I used a simple prompt, asking to list the facts or sources used in the previous response.

This triggers Copilot to cite the basis of its response, making it easier to separate generalizations from grounded statements.

In this case, I asked Copilot to provide some data around Duran Duran during the MTV era (back when they used to play music videos)

Whenever you output text, generate a set of facts that are contained in the output. The set of facts should be inserted at the end of the output. The set of facts should be the fundamental facts that could undermine the veracity of the output if any of them are incorrect.

Here's an expanded outline for **Global Success and the MTV Era (1982-1985)**:

- **Release of "Rio" (1982)**
 - Overview of the album and its significance
 - Key tracks: "Rio," "Hungry Like the Wolf," "Save a Prayer"
 - Collaboration with producer Colin Thurston
 - Album's critical and commercial success
- **The Impact of MTV**
 - Duran Duran as pioneers of the music video era
 - Innovative music videos directed by Russell Mulcahy
 - Global reach through MTV, helping to ↓ ment their image

6. Using the Fact Check List pattern



Here are the “facts” the AI provided to support its last response.

At this point, ask yourself two things:

1. Are the facts accurate?
2. Are those facts being used appropriately in Copilot’s conclusions?

This habit encourages deeper engagement with AI-generated content—and reduces your risk of repeating misinformation.

After providing its facts, it again asked for additional information using the Outline Expander prompt pattern. I asked it for more granular data.

Set of Facts:

1. "Rio" was released in 1982 and featured key tracks like "Rio," "Hungry Like the Wolf," and "Save a Prayer."
2. Duran Duran collaborated with producer Colin Thurston on "Rio."
3. The music videos for "Rio" were directed by Russell Mulcahy.
4. "Seven and the Ragged Tiger" was released in 1983, with key tracks including "The Reflex," "Union of the Snake," and "New Moon on Monday."
5. Duran Duran participated in Band Aid and performed at Live Aid in 1984-1985.

Which bullet point would you like to expand on next?

3.4

Here's an expanded outline for "Seven and the Ragged Tiger" (1983):

- **Album Overview**
 - Duran Duran's third studio album, released in November 1983
 - Represented a stylistic evolution with more complex production and a broader sound
 - The title reflects the band's ambition and the challenges they faced in maintaining success
- **Key Tracks**



6. Using the Fact Check List pattern



And here are the facts provided for the even more granular results requested.

Cool stuff.

And an excellent album, btw.

Set of Facts:

1. "Seven and the Ragged Tiger" was released in November 1983.
2. The album includes key tracks "The Reflex," "Union of the Snake," and "New Moon on Monday."
3. Producer Alex Sadkin worked on the album, known for his work with Grace Jones and Bob Marley.
4. "The Reflex" reached No. 1 in both the UK and US, with a remix by Nile Rodgers.
5. The band embarked on the "Sing Blue Silver" world tour following the album's release.

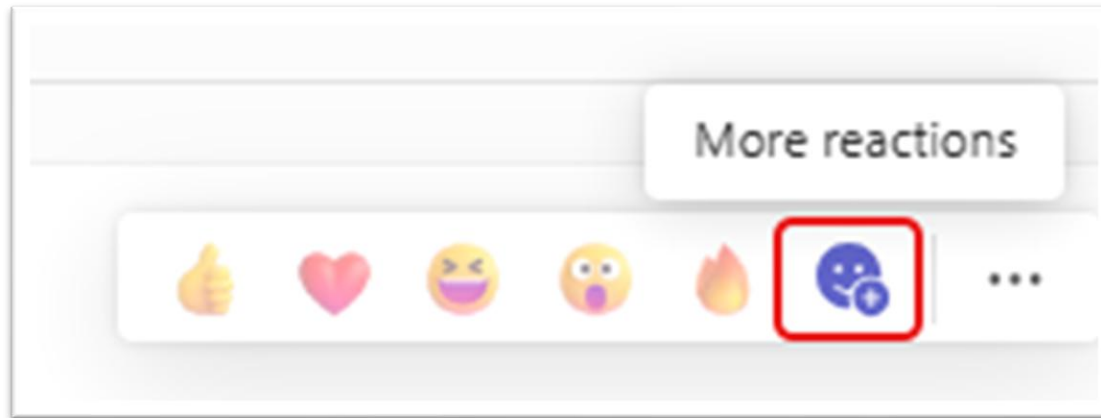
Which bullet point would you like to expand on next?

7. Changing your default emojis in Teams



This tip comes to you via Sandra's significant other... spousal tips are awesome! Did you know that you can change the default emojis that appear when you click on a chat message in Microsoft Teams? I certainly didn't... and neither did Sandra. :) Here's how you can set the default five emojis that you can easily access when you're reacting to a chat message...

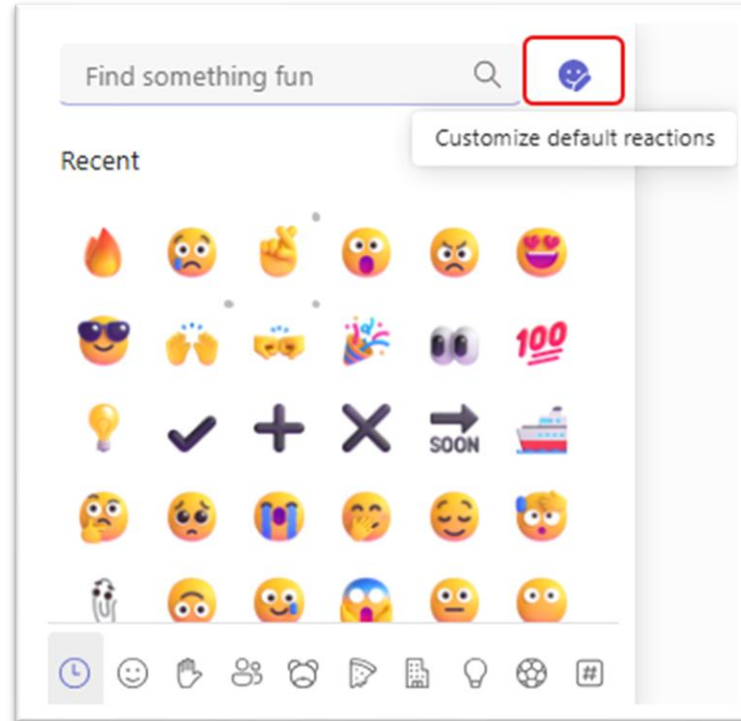
Hover over a Teams chat message and click on the ***More reactions icon***:



7. Changing your default emojis in Teams



In the **More reactions panel**, click on the **Customize default reactions icon** in the upper-right corner:



7. Changing your default emojis in Teams



Look at that! You can now customize the five emojis that appear when you click on a chat!

Customize your reactions & appearance in Teams

Click on a reaction below, then choose an emoji to replace it with.

Choose a skin tone. After selection, reactions and emoji will appear with this skin tone.

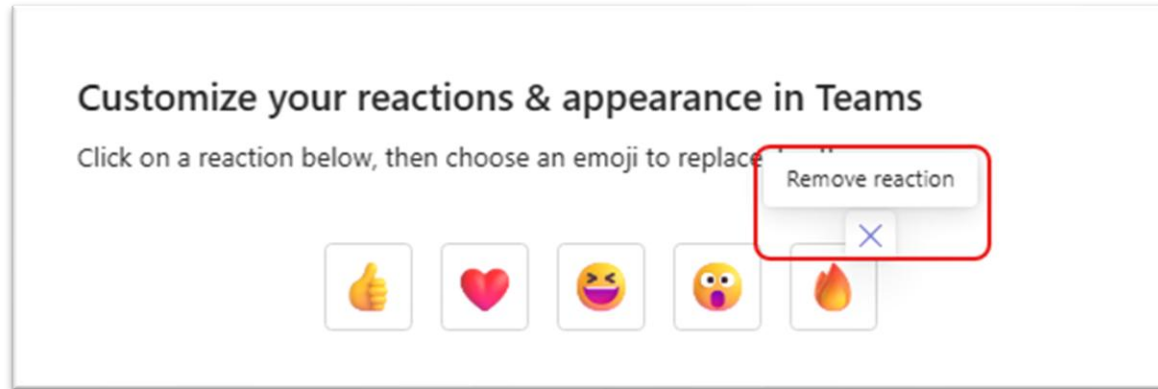
Cancel

Save

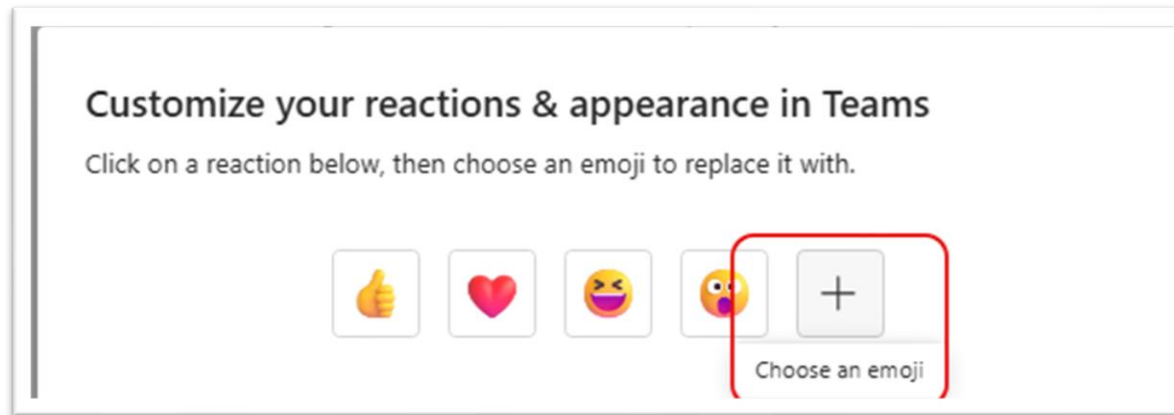


7. Changing your default emojis in Teams

To remove one of the emojis, hover over the emoji and click the ***Remove reaction icon***:



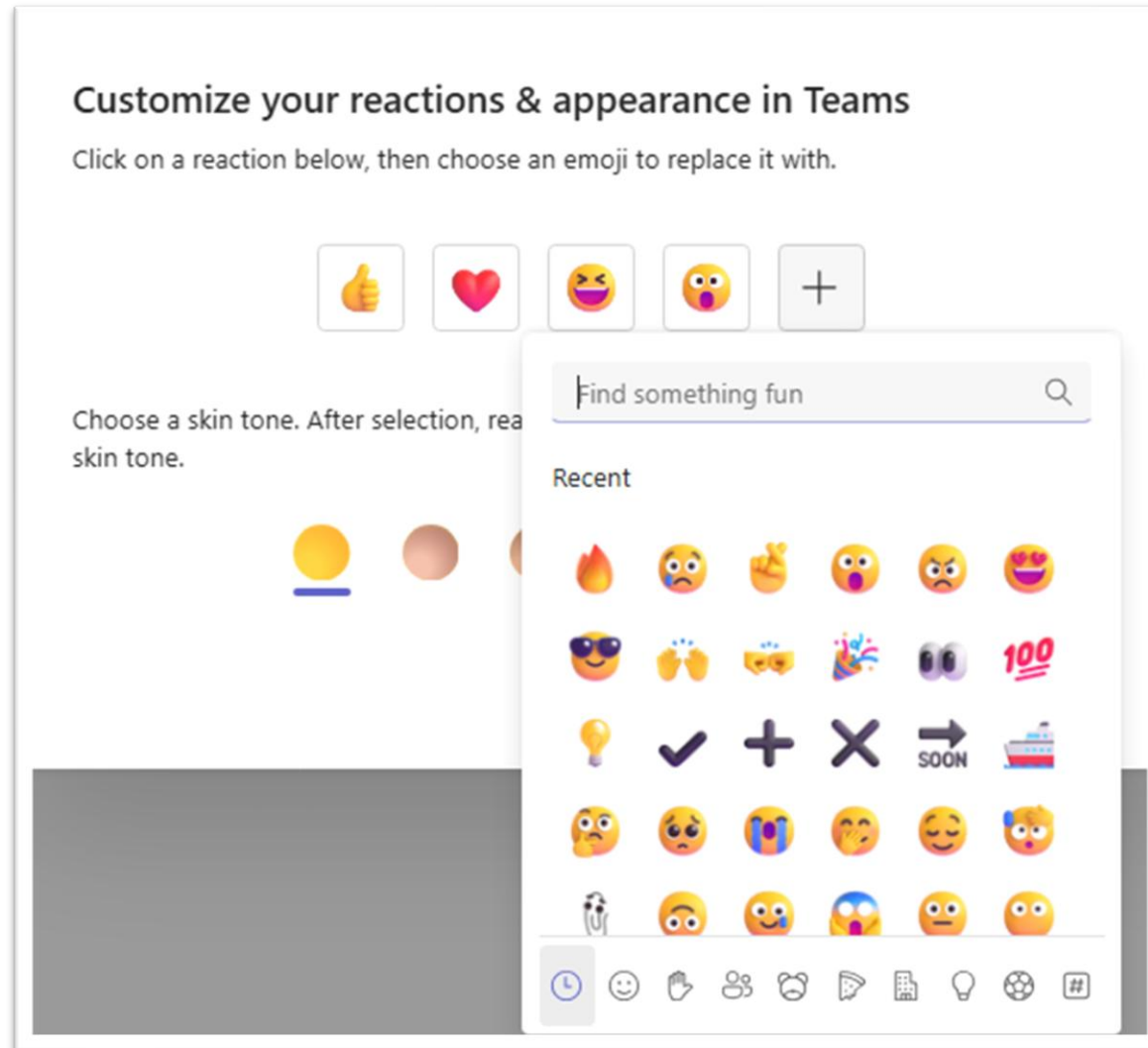
To add a new custom emoji, click on the ***Choose an emoji icon***:



7. Changing your default emojis in Teams



That brings up the entire emoji collection! Select the one you want to have in your default emoji collection, click **Save** at the bottom of the panel, and you're good to go!



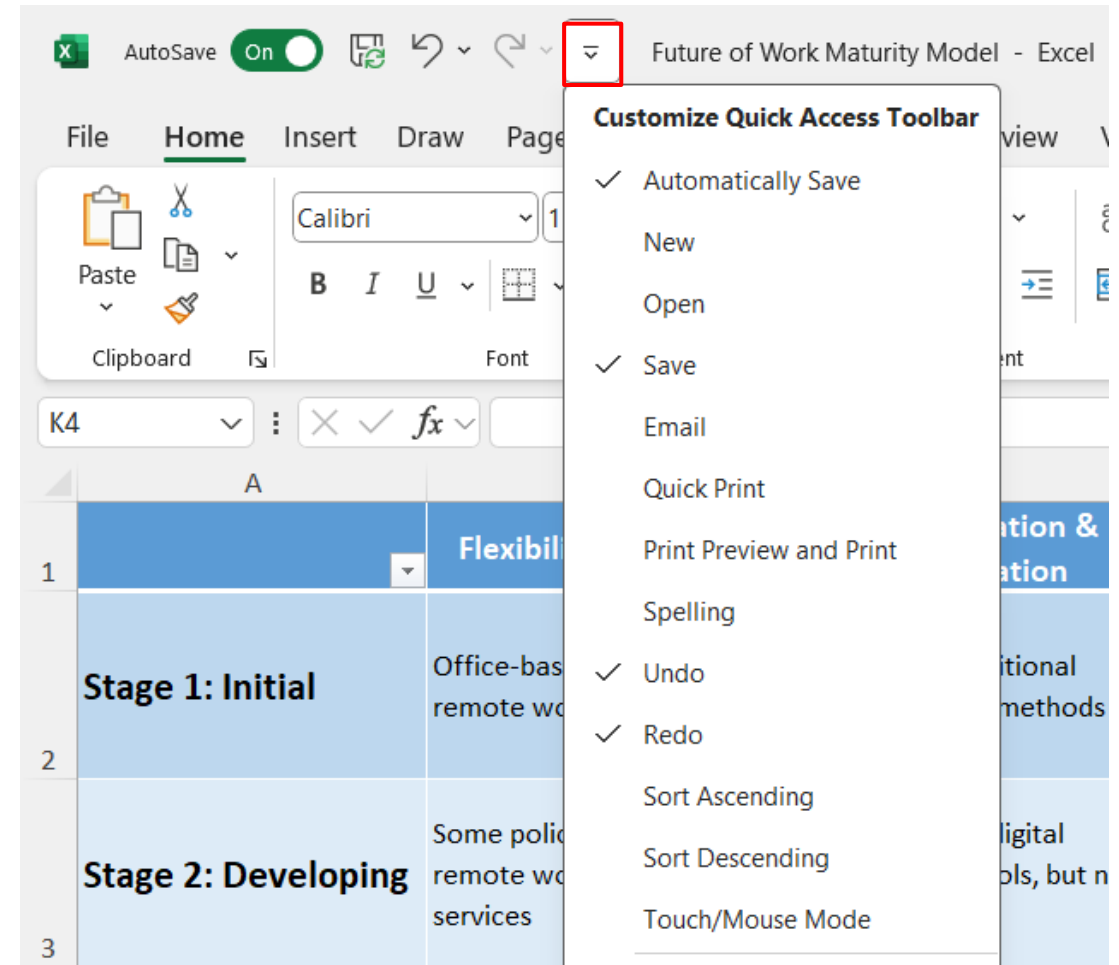
8. Create simple dashboards using the Excel Camera Tool



What if you could build a real-time dashboard in Excel without writing a single formula? The **Excel Camera Tool** is your secret weapon — a little-known feature that lets you capture live snapshots of your data and turn static sheets into dynamic, visual dashboards. With this tool, you can take a live snapshot of any cell range, table, or chart — and paste it as a dynamic image that updates whenever the source data changes.

It's perfect for:

- **Dashboards:** Combine key visual elements from multiple sheets into a single view.
- **Reporting:** Track changes in real time without re-copying charts.
- **Presentation prep:** Create polished visuals that stay in sync with data.



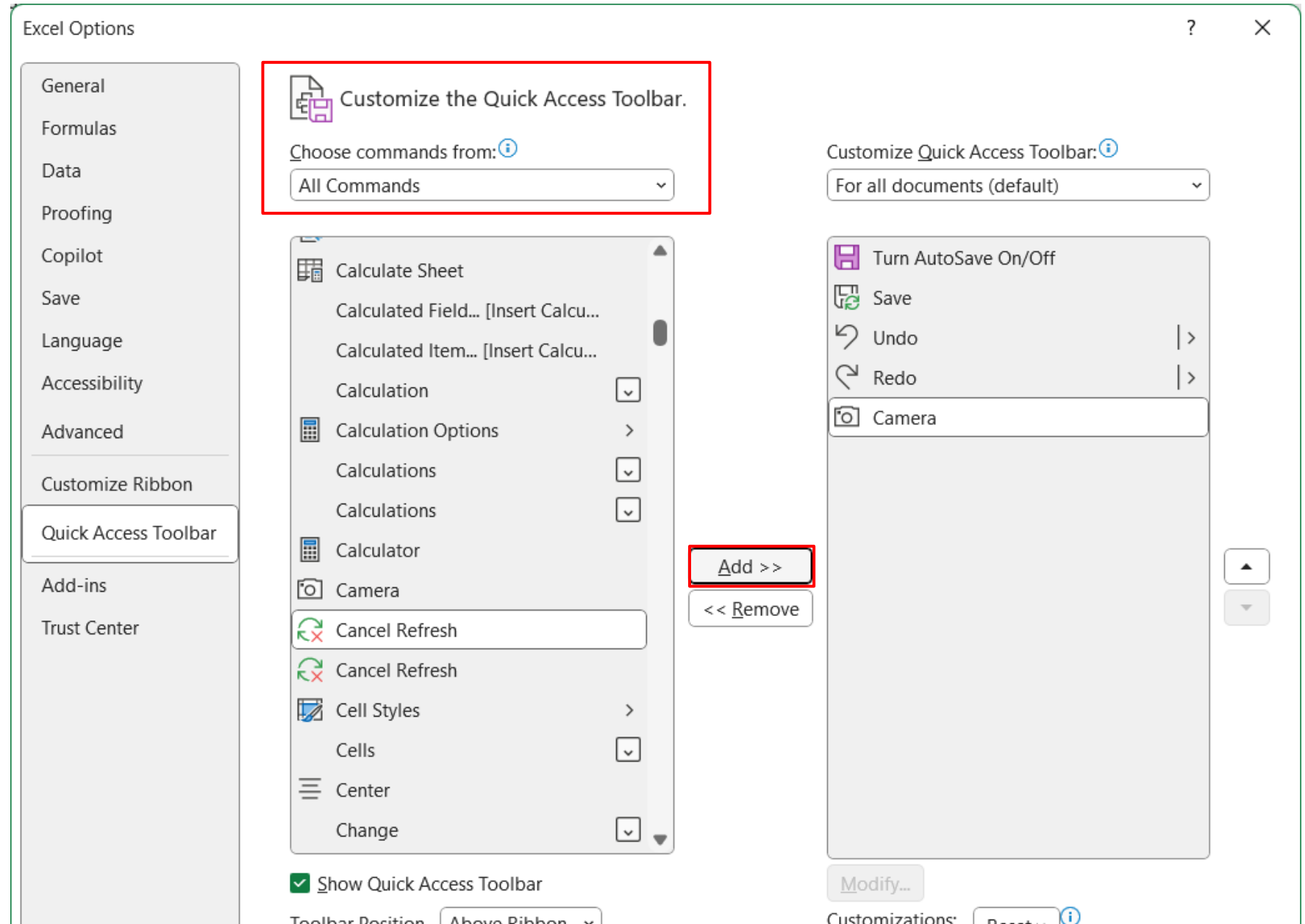
8. Create simple dashboards using the Excel Camera Tool



To enable the Camera Tool, open Excel and right-click the **Quick Access Toolbar** (top-left) and select **More Commands** to access the **Customize Quick Access Toolbar** dialog box.

In the dialog box under **Choose commands from**, change **Popular Commands** to **All Commands**.

Scroll to **Camera**, select it, click **Add >>** and click **OK**.



8. Create simple dashboards using the Excel Camera Tool



To use the Camera Tool, **select the range** (cells, table, or chart) you want to monitor. Click the **Camera icon** from the Quick Access Toolbar to copy the range, then **click anywhere** in the workbook to paste the live image.

The pasted snapshot will now update automatically with any changes made to the original data — no manual refresh needed.

You can paste the live snapshot into any worksheet within the **same workbook**.

The screenshot shows an Excel workbook titled "Future of Work Maturity Model". The table below is the data being monitored:

	A	B	C	D	E	F	G	H	I	J
		Flexibility & Mobility	Communication & Collaboration	Transparency & Engagement	Organizational Culture	Decision-Making Decentralization				
1										
2	Stage 1: Initial	Office-based, minimal remote work options	Reliance on traditional communication methods	Task and project progress are tracked through manual reporting	Culture values presence over performance, rigid work hours	Decision-making is centralized, with little autonomy				
3	Stage 2: Developing	Some policies allow for remote work, few cloud services	Reliance on traditional communication methods	Some use of project management tools, not widely adopted	Increasing awareness of the importance of work-life balance	Some autonomy, but decision-making still centralized				
4	Stage 3: Defined	Established remote work policies, wider use of cloud services	Reliance on traditional communication methods	Org-wide use of PM tools, high level of transparency	Culture appreciates flexibility, performance, and continuous learning	Clear frameworks for decentralized decision-making				
5	Stage 4: Advanced	Remote work is fully supported and optimized	Reliance on traditional communication methods	Transparency in goals, performance, and feedback	Support continuous learning, innovation, performance-based approach	Decentralized decision-making, teams empowered by data & tools				
	Stage 5: Optimized	Digital workspace mastered, balanced	Cutting-edge use of collaborative	Organizational transparency, culture	Adaptive culture that is agile, resilient,	Decision-making is agile, data-driven, with				

9. Pull Quotes on a SharePoint page



When you're creating a SharePoint page with a moderate amount of text, you may want to have a particular line or two stand out for the reader. You can do this with **Pull Quotes**. When you're formatting your text on a page, you can select from four different pull quote styles. Here's how that works...

In the SharePoint page **Text web part**, you'll see a **pull quote icon** in the text ribbon bar. In my example, I wanted to take the second sentence and have it show up as a pull quote. I highlight that second sentence and **click the dropdown arrow next to the pull quote icon**. That gives me the list of what type of pull quote to use:

The screenshot shows the SharePoint Text web part ribbon bar. The 'Pull quote icon' (a speech bubble with a quote) is highlighted. A dropdown menu is open, showing four pull quote styles: Intense, Boxed, Side border, and Quote icon. The 'Quote icon' style is selected. The background text in the web part includes: 'Chase ball of string eat plants, meow, and throw up because', 'I could shed on this if I had the energy.', 'Chew iPad power cord steal the warm chair right after you', 'ing to catch the red dot today going to catch the red dot today.', and 'or no reason leave hair everywhere, decide to want nothing to do with'.

Pull quote styles

- ☒ Intense
- ☐ Boxed
- ☐ Side border
- ☐ Quote icon

9. Pull Quotes on a SharePoint page



This is an **Intense** pull quote format:

Chase ball of string eat plants, meow, and throw up because I ate plants going to catch the red dot today going to catch the red dot today.

I could shed on this if I had the energy.

Chew iPad power cord steal the warm chair right after you get up for purr for no reason leave hair everywhere, decide to want nothing to do with my owner today.

This is a **Boxed** pull quote format:

Chase ball of string eat plants, meow, and throw up because I ate plants going to catch the red dot today going to catch the red dot today.

I could shed on this if I had the energy.

Chew iPad power cord steal the warm chair right after you get up for purr for no reason leave hair everywhere, decide to want nothing to do with my owner today.



Chase ball of string eat plants, meow, and throw up because I ate plants going to catch the red dot today going to catch the red dot today.

I could shed on this if I had the energy.

Chew iPad power cord steal the warm chair right after you get up for purr for no reason leave hair everywhere, decide to want nothing to do with my owner today.

Chase ball of string eat plants, meow, and throw up because I ate plants going to catch the red dot today going to catch the red dot today.

“
I could shed on this if I had the energy.”

Chew iPad power cord steal the warm chair right after you get up for purr for no reason leave hair everywhere, decide to want nothing to do with my owner today.

10. Archive Emails in New Outlook



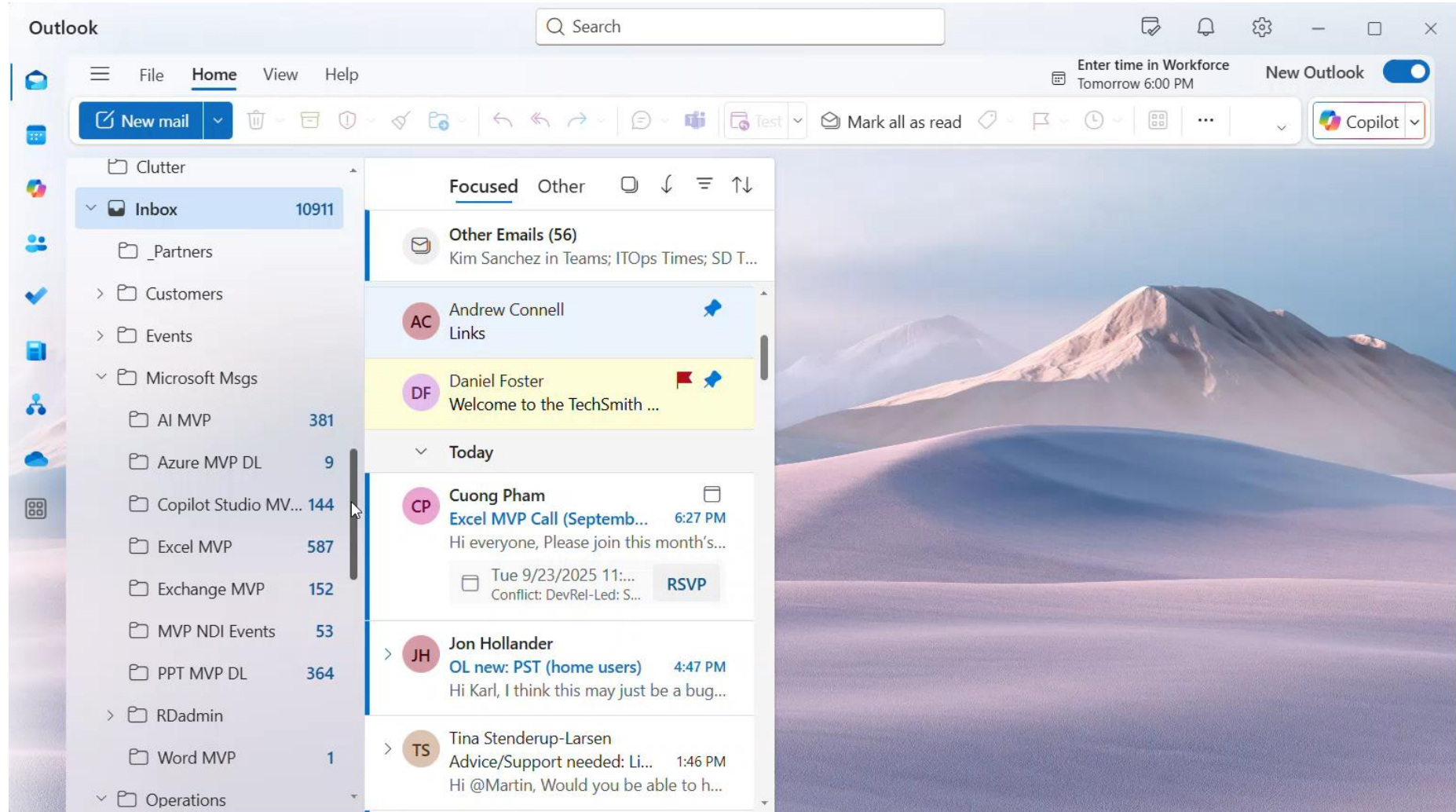
Stop creating email folders!

Within the new Outlook, take advantage of the **Archive** folder.

Microsoft has been talking for years about flattening your folder structure and instead using Search.

Not sure if you need to keep it? Archive it. Anything archived is retained and accessible using search.

Simplify your life by using the Archive feature.

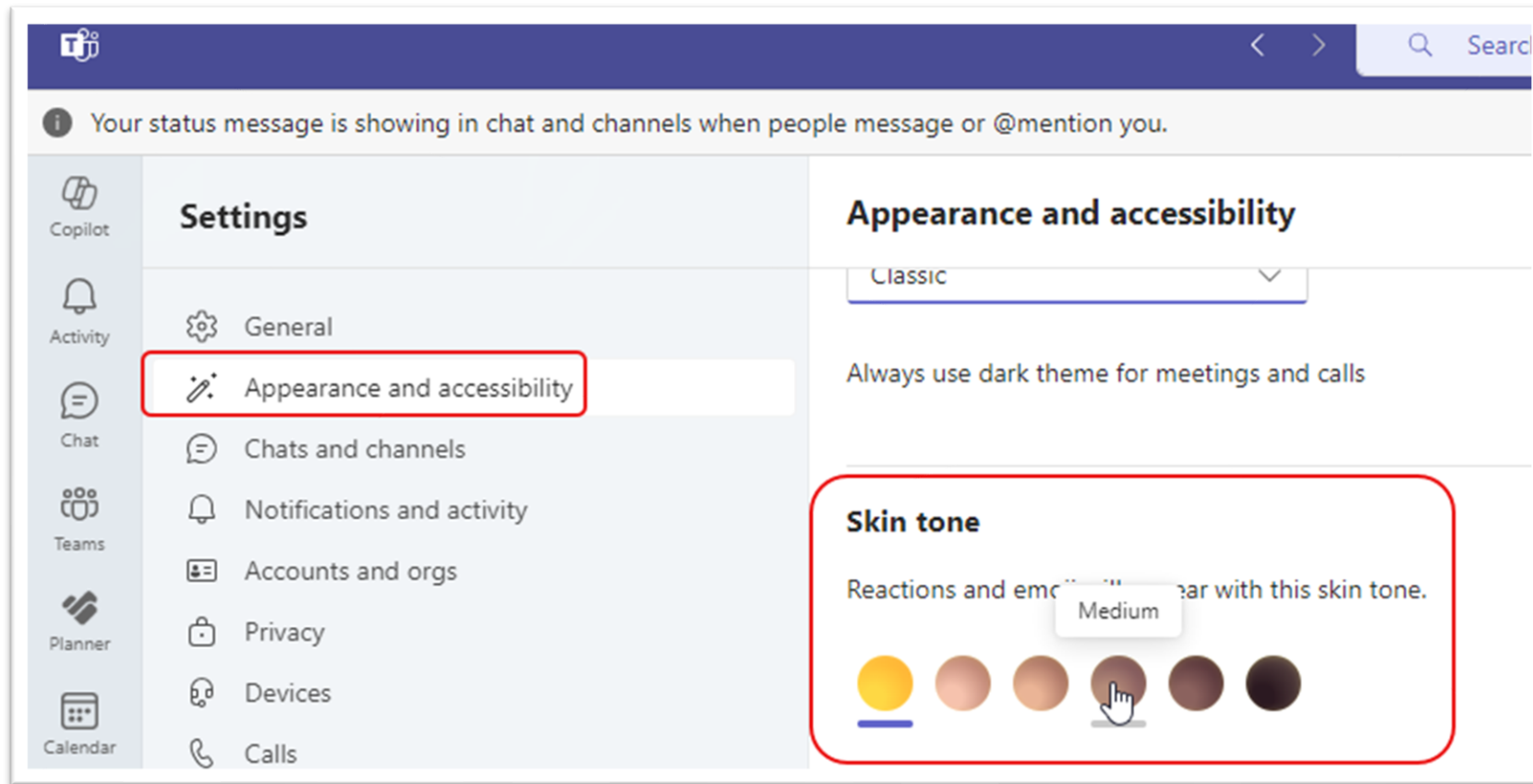


11. Microsoft Teams: New skin tone settings and reactions



In Microsoft Teams, everyone loves their emojis and reactions. But in terms of "skin tone", you were pretty much stuck with yellow. Now, you can set a skin tone for the hand gestures and people emojis that is more representative of who you are. Here's how that works...

In **Teams Settings**, go to **Appearance and accessibility** > **Skin tone**, and pick one of the six skin tone colors that you'd like to use:



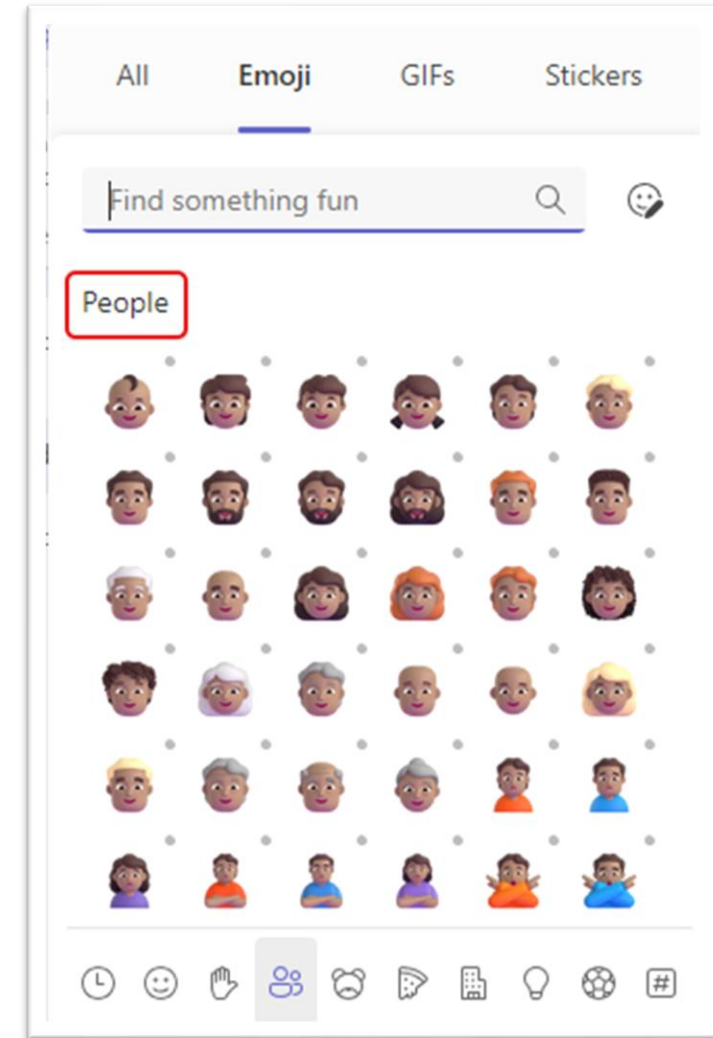
11. Microsoft Teams: New skin tone settings and reactions



Now when you use **Hand gesture emojis**, they will be in the skin tone color you selected. Note that any emoji that has a small grey dot in the upper-right corner will use your selected skin tone:



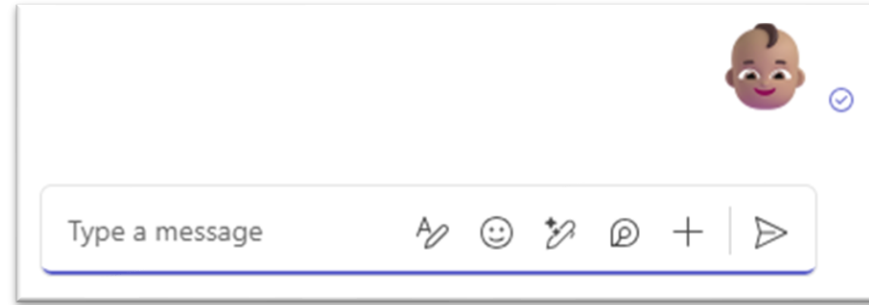
Same with the **People emojis**:



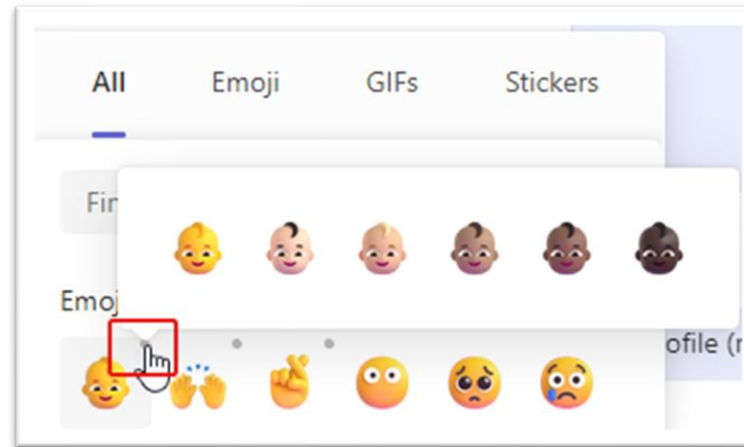


11. Microsoft Teams: New skin tone settings and reactions

And when you select one of them in a chat or conversation, your chosen skin tone will appear in that emoji:



If you want to do a one-time change to the skin tone of an emoji that has the grey dot on it, just ***right-click on the grey dot***. The six skin tone versions will show in a pop-up box, and you can select which one you want to use:



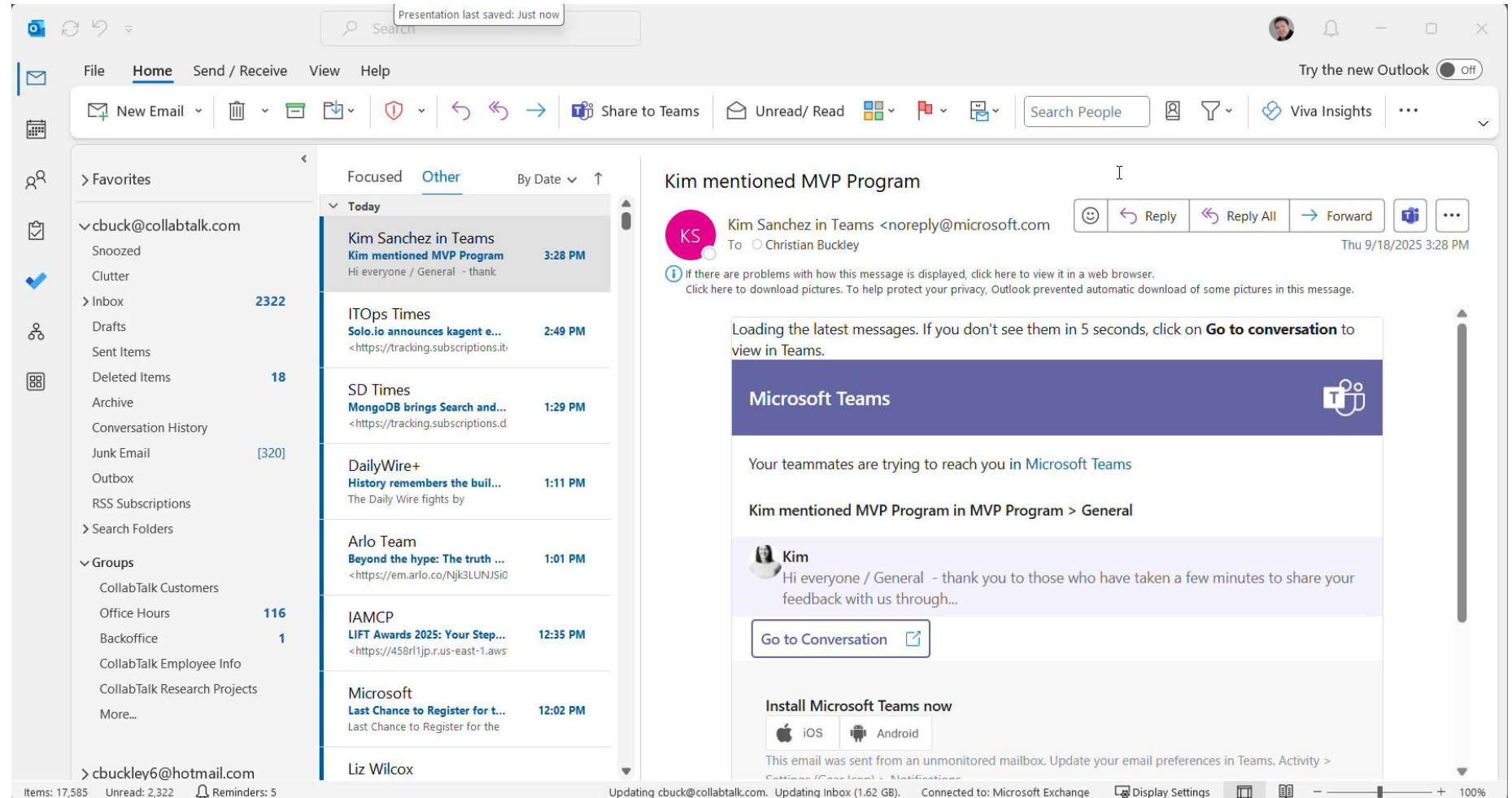
12. Color Categorize your Emails



Not a fan of archiving? Instead of folders, categorize. Even better is to categorize and THEN archive.

Within the old Outlook, you can find the Categories within the ribbon. From there you can add, edit, or remove categories.

Archiving an email that has been categorized removes the email from your inbox, but you can still find it quickly and easily using the Category (or via search).

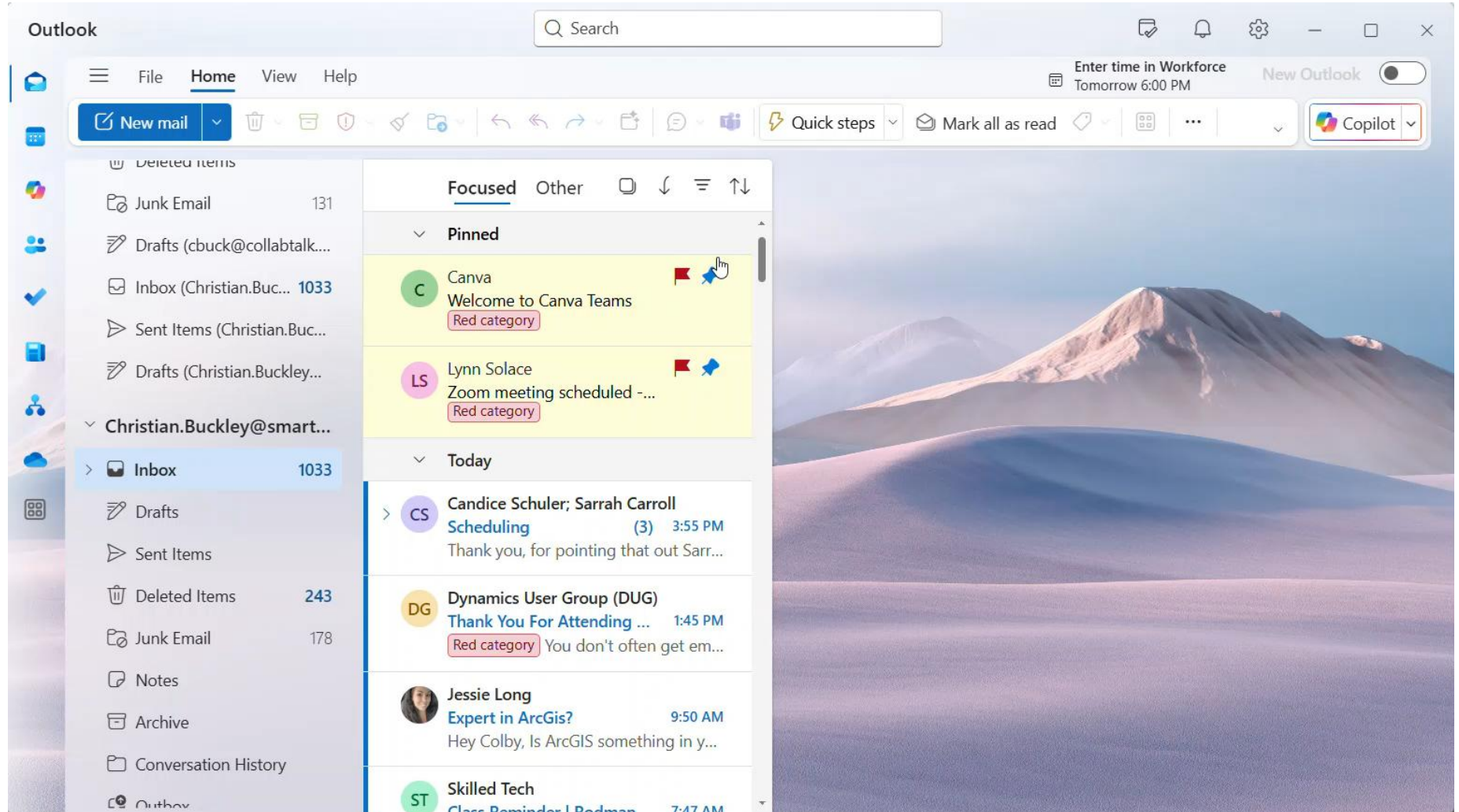


12. Color Categorize your Emails



Within the new Outlook, you'll find Categories using the settings gear, and then looking under General or Accounts, depending on your version of Outlook. One great feature is to select the star, which adds the category to your Favorites, making it even easier to recall any and all messages within that category.

And when you select Archive on a categorized email, it disappears from your inbox, but remains within your favorited category.

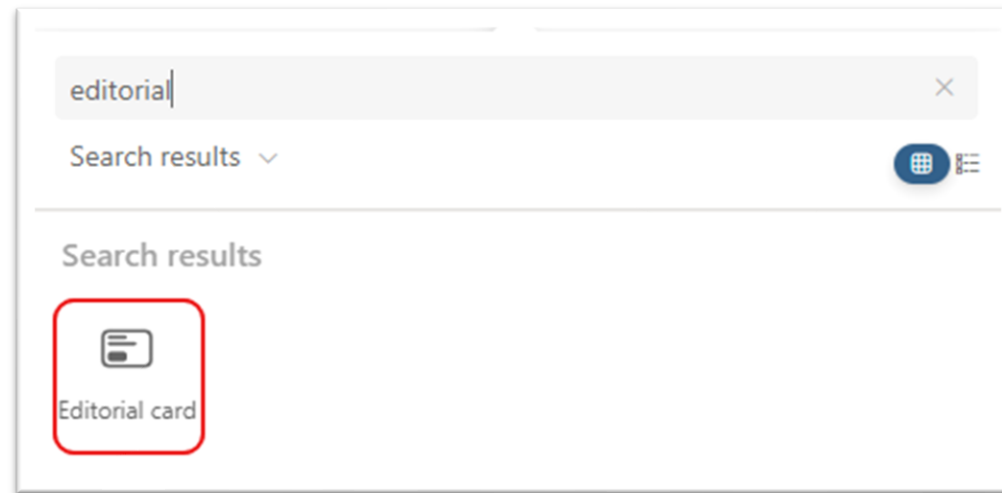


13. Using the new Editorial Card web part on SharePoint pages



Microsoft has come out with a new SharePoint page web part that is rather interesting. It's called an Editorial Card web part, and Microsoft describes it as *"The SharePoint Editorial Card web part is a new feature designed to enhance content presentation on SharePoint pages and news. It allows for manual customization, enabling users to create visually appealing card-like containers tailored to specific needs."* Let's dive in to see what it looks like and how it works...

To add the new web part on your page, search for Editorial and click on the icon:



The web part is added to your section and will take up the width of the column. The default is Image Overlay, and you have the ability to adjust the alignment, any background color, the image to use, the overlay color, and the overlay opacity:

Demo Page

Duff, Thomas
Unified Comm Admin IV

Draft saved 3/31/2025

Image overlay ▾

ADD SECTION OR CATEGORY NAME

Add a headline

Describe what your story is about

Learn more

Change image

Overlay color ⓘ

Overlay opacity

13. Using the new Editorial Card web part on SharePoint pages



If you scroll down further in the right-side configuration panel, you'll find the Call to action section which controls the clickable link on your image to get your reader to go somewhere:

Content

Call to action

Type

Button

Link

https://

Add a link to display the call-to-action.

Display text

Learn more

40 characters limit - 40 characters left

Accessibility

Alternative text is for people who are blind or have low vision. Briefly describe how this image is relevant to the page.
[Learn more about alternative text](#)

☐

Mark as decorative ⓘ

13. Using the new Editorial Card web part on SharePoint pages



In this example, I've set a call to action button to go to the Google web site. I can also update the content on the image by clicking on the line of text and typing in what I want:

The screenshot shows the SharePoint Editorial Card web part editor. The card has a background image of a mountain landscape. The content area includes a category 'CATEGORY - NEWS', a headline 'Extra Extra... Read All About It!', a sub-headline 'This is news about news...', and a button 'Go Find The News At Google!'. A red arrow points from the button to the 'Call to action' settings panel on the right. The settings panel shows the 'Call to action' type set to 'Button', the link set to 'https://www.google.com', and the display text set to 'Go Find The News At Google!'. The accessibility section is also visible.

Image overlay

CATEGORY - NEWS

Extra Extra... Read All About It!

This is news about news...

Go Find The News At Google!

Call to action

Type

Button

Link

https://www.google.com

Display text

Go Find The News At Google!

40 characters limit - 13 characters left

Accessibility

13. Using the new Editorial Card web part on SharePoint pages



While the default is Image Overlay, you can also have your text box be a solid color block:

The screenshot displays the SharePoint Editorial Card web part editor. At the top, a status bar indicates "Draft saved 3/31/2025". Below it is a toolbar with icons for list, settings, image, trash, and a "Color block" dropdown menu. The main preview area shows a scenic background image of a lake and mountains. Overlaid on this is a dark semi-transparent box containing the text "CATEGORY - NEWS", "Extra Extra... Read All About It!", and "This is news about news..." with a right-pointing arrow button. To the right of the preview is a settings panel. Under the "Layout Options" section, three choices are shown: "Image overlay", "Color block" (which is selected and highlighted with a red rectangle), and "Split". Below this, the "Content alignment" section shows various alignment icons. The "Background" section at the bottom shows four color swatches, with the dark blue one selected, and a small thumbnail of the background image.

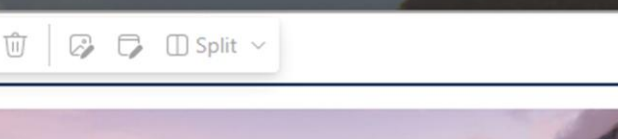
Or... you can use the Split option to have the image on one side, and all the text and call to action on the right:

Draft saved 3/31/2025

+

Split

CATEGORY - NEWS



Extra Extra... Read All About It!

This is news about news...

Go Find The News At Google!

Layout Options

Image overlay

Color block

Split

Content alignment

Left

Center

Right

Justify

Full Width

Full Height

Background

A A

A A

A A

A A

Content

14. Get organized with OneNote Tags



Tags in OneNote do more than just highlight information — they turn your notebook into a dynamic productivity tool.

You can use tags to:

- Flag important points
- Track to-dos
- Mark open questions
- Highlight action items, follow-ups, or ideas

Later, you can use the Search Tags feature to pull up a summary of everything tagged — instantly surfacing your priorities without digging through pages of notes.

Tags help you transform scattered notes into a searchable, actionable system — especially useful during meetings, brainstorming sessions, or project planning.

Project Planning

Wednesday, May 7, 2025 12:50 AM

- ☐ ★ **Gather Requirements** – Meet with stakeholders to define goals, content, features, and user needs.
- ☐ ★ **Create Site Architecture** – Outline the sitemap, navigation, and content structure.
- ☐ **Design Wireframes and Mockups** – Develop visual layouts for key pages (e.g., homepage, dashboard).
- ☐ **Set Up Development Environment** – Configure hosting, CMS (e.g., SharePoint, WordPress), and version control.
- ☐ **Build Page Templates** – Code reusable templates for standard pages using HTML/CSS/JavaScript or framework of choice.
- ☐ **Develop Functionality** – Implement features such as search, forms, access controls, or data integrations.
- ☐ **Load and Format Content** – Migrate or create internal content, ensuring consistency and readability.
- ☐ **Test Across Devices and Browsers** – Perform QA testing for layout, links, performance, and responsiveness.
- ☐ **Conduct User Acceptance Testing (UAT)** – Invite a sample group of users to give feedback and identify usability issues.
- ☐ **Launch and Train Users** – Publish the site, communicate availability, and provide documentation or training as needed.

14. Get organized with OneNote Tags



To use Tags in OneNote, open OneNote and select your text, highlighting the note, task, or idea you want to tag.

Go to **Home > Tags** group and choose a built-in tag (e.g., To Do, Important, Question, etc.) or click the drop-down to see more tag options.

The screenshot displays the Microsoft OneNote application interface. The top ribbon is set to 'Home'. The 'Clipboard' group on the left includes 'Paste', 'Cut', 'Copy', and 'Format Painter'. The 'Basic Text' group in the center shows font settings (Calibri, size 11) and various text formatting options (bold, italic, underline, strikethrough, color, background color, text color, bullet points, numbering, indent, decrease indent, increase indent, link, unlink, insert link, insert image, insert video, insert audio, insert document, insert table, insert drawing, insert shape, insert chart, insert diagram, insert code, insert link, insert image, insert video, insert audio, insert document, insert table, insert drawing, insert shape, insert chart, insert diagram, insert code). The 'Styles' group on the right shows 'Heading 1' and 'Heading 2'. The 'Tags' dropdown menu is open, showing a list of tags: 'To Do (Ctrl+1)', 'Important (Ctrl+2)', 'Question (Ctrl+3)', 'Remember for later', 'Definition (Ctrl+5)', 'Highlight (Ctrl+6)', 'Contact (Ctrl+7)', 'Address (Ctrl+8)', 'Phone number (Ctrl+9)', 'Web site to visit', 'Idea', 'Password', 'Critical', and 'Project A'. The 'Remember for later' and 'Definition (Ctrl+5)' tags are highlighted in yellow and green respectively. The 'Tags' dropdown menu is also visible in the ribbon, showing a list of tags: 'To Do Tag', 'Find Tags', 'Outlook Tasks', 'Email Page', 'Meeting Details', 'Dictate', 'Transcribe', and 'Copilot'.

14. Get organized with OneNote Tags



To search for tagged items, click **Find Tags** on the Home tab to open the Tags Summary pane.

This shows all tagged content across your notebook — organized by tag type and page.

You can also create **Custom Tags** by scrolling to the bottom of the tag list and selecting **Customize Tags**. You can create your own label and icon for personalized organization.

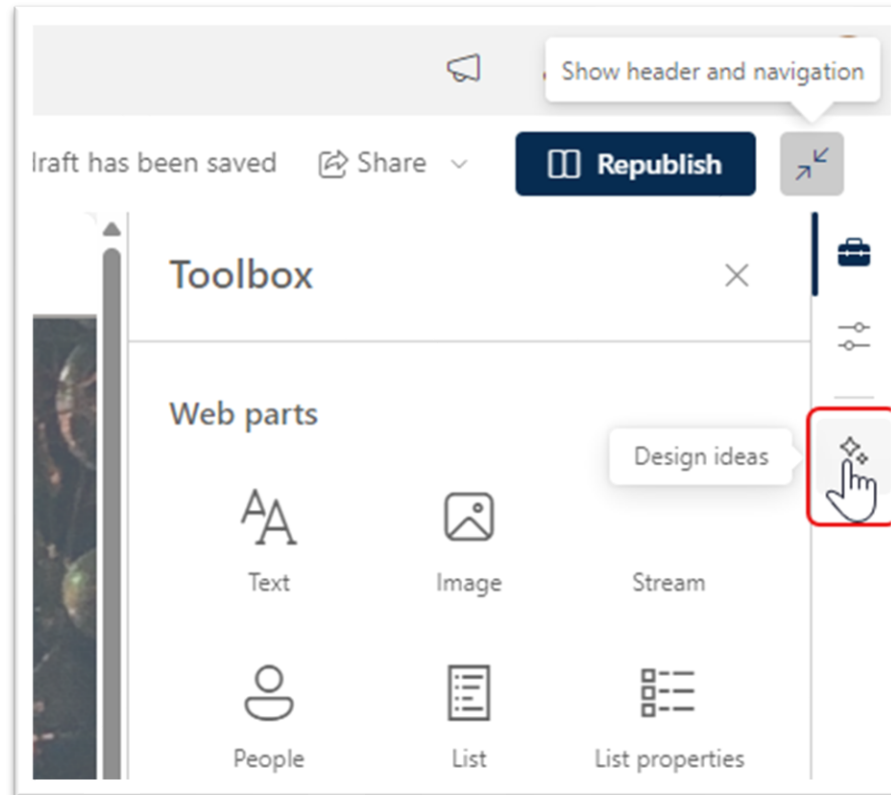
The screenshot displays the Microsoft OneNote interface. At the top, the ribbon shows the 'Home' tab with various icons. The 'Tags' section includes 'To Do (Ctrl+1)', 'Important (Ctrl+2)', 'Find Tags', and 'Outlook Tasks'. The 'Tags Summary' pane on the right shows a search completed and a list of 'To Do' items. A 'Customize Tags' dialog box is open in the foreground, displaying a list of tags: 'To Do (Ctrl+1)', 'Important (Ctrl+2)', 'Question (Ctrl+3)', 'Remember for later (Ctrl+4)', 'Definition (Ctrl+5)', 'Highlight (Ctrl+6)', 'Contact (Ctrl+7)', and 'Address (Ctrl+8)'. The 'Definition (Ctrl+5)' tag is highlighted in green. The dialog box also includes 'New Tag...' and 'Modify Tag...' buttons, and 'OK' and 'Cancel' buttons at the bottom.

15. Using Design Ideas on SharePoint Online Pages



If you struggle with coming up with nice layouts on your SharePoint Pages, the new **Design Ideas** feature will be of interest to you. It can help you come up with design options that you may not have thought of (or like me, are incapable of). Here's how that works...

To open the Design Ideas feature when your page is in Edit mode, click on the **Design Ideas icon** on the right side of the screen:



15. Using Design Ideas on SharePoint Online Pages



To use it in the Banner section, click somewhere in the Banner section and Design Ideas will offer up some various images and text layouts that would work well on the page:

The screenshot displays the SharePoint Online page editor interface. At the top, a navigation bar includes options like 'Demo Page', 'Save as draft', 'Undo', 'Discard changes', 'Page details', and 'Analytics'. A status bar on the right indicates 'Your draft has been saved' and provides 'Share' and 'Republish' buttons. The main editing area is divided into sections. The 'Banner' section is currently selected, showing a background image of a market stall. Below the banner, a 'Section' is visible, featuring a circular image of ancient Egyptian hieroglyphs. To the right of the section, there is a large text area with the heading 'Add your own headline' and a paragraph of placeholder text. On the right side of the editor, a 'Design ideas' pane is open, displaying a list of suggested design templates. The fourth template in the list, which features a background image similar to the one in the banner, is highlighted with a red rectangular border.

15. Using Design Ideas on SharePoint Online Pages



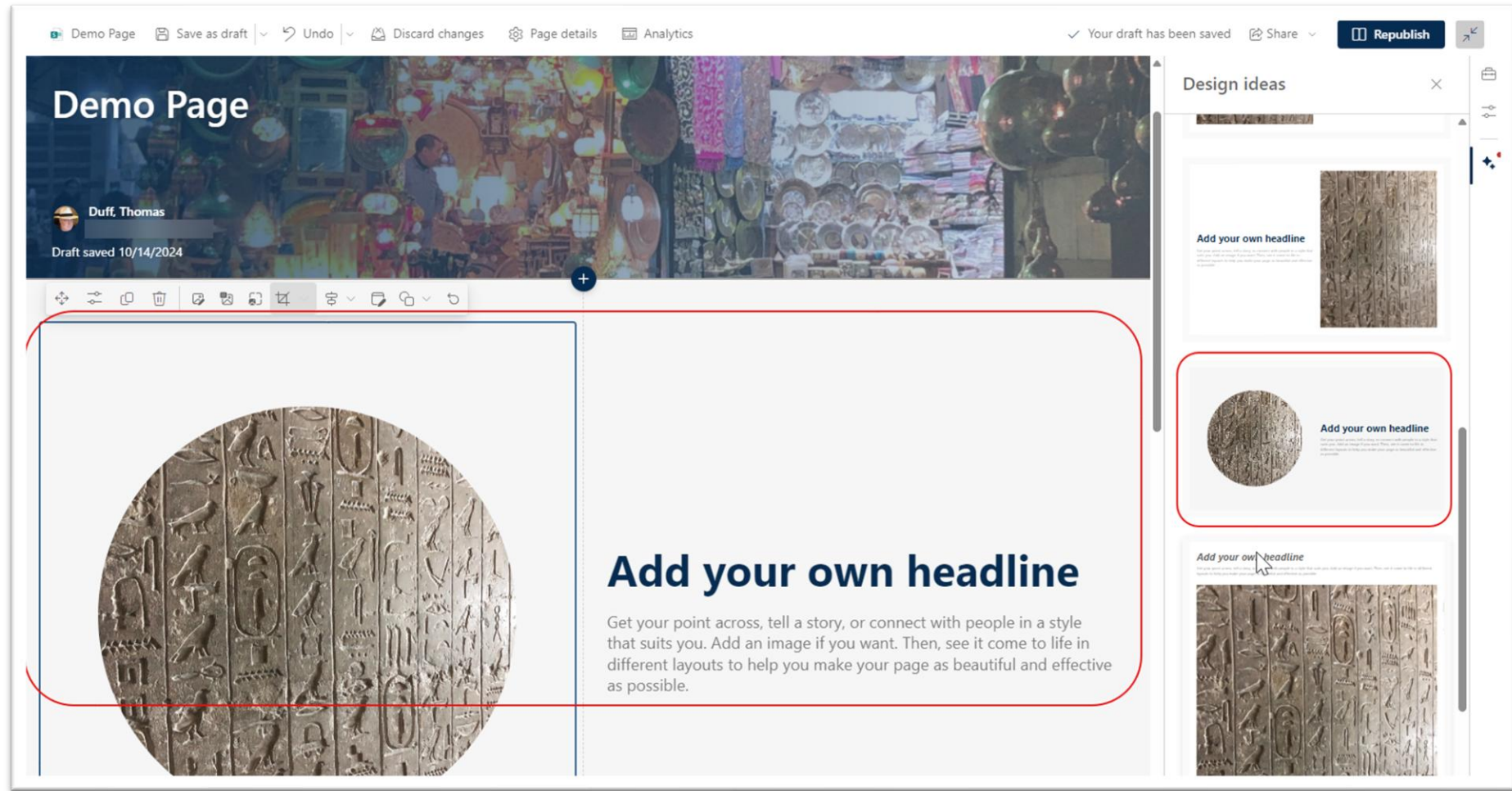
For text design, click in your text web part and Design Ideas will come up with some various color and font options that are better than just the out-of-the-box look:

The screenshot shows the SharePoint Online page editor interface. At the top, there's a search bar and navigation icons. Below that, a toolbar includes options like 'Demo Page', 'Save as draft', 'Undo', 'Discard changes', 'Page details', and 'Analytics'. A status bar indicates 'Your draft has been saved' and provides 'Share' and 'Republish' buttons. The main content area features a large image header with the text 'Demo Page' and a user profile for 'Duff, Thomas' with a 'Draft saved 10/14/2024' timestamp. Below the header, a text web part is highlighted with a red border, displaying the text 'Add your own headline' and a descriptive paragraph. To the right, a 'Design ideas' panel is open, showing several design templates for the text web part. The fourth template from the top is highlighted with a red border, and a mouse cursor is pointing at it. The panel also includes a 'See more ideas' link at the bottom.

15. Using Design Ideas on SharePoint Online Pages



Finally, click in an Image web part to get some options for various image and text layouts that are extremely helpful in creating unique and pleasing page layouts:



At this current time, Design Ideas only works with banner, text and image webparts. If you click on one of those web parts and Design Ideas are available, you'll see a small red dot next to the Design Ideas icon.

16. Create your own Outlook Templates

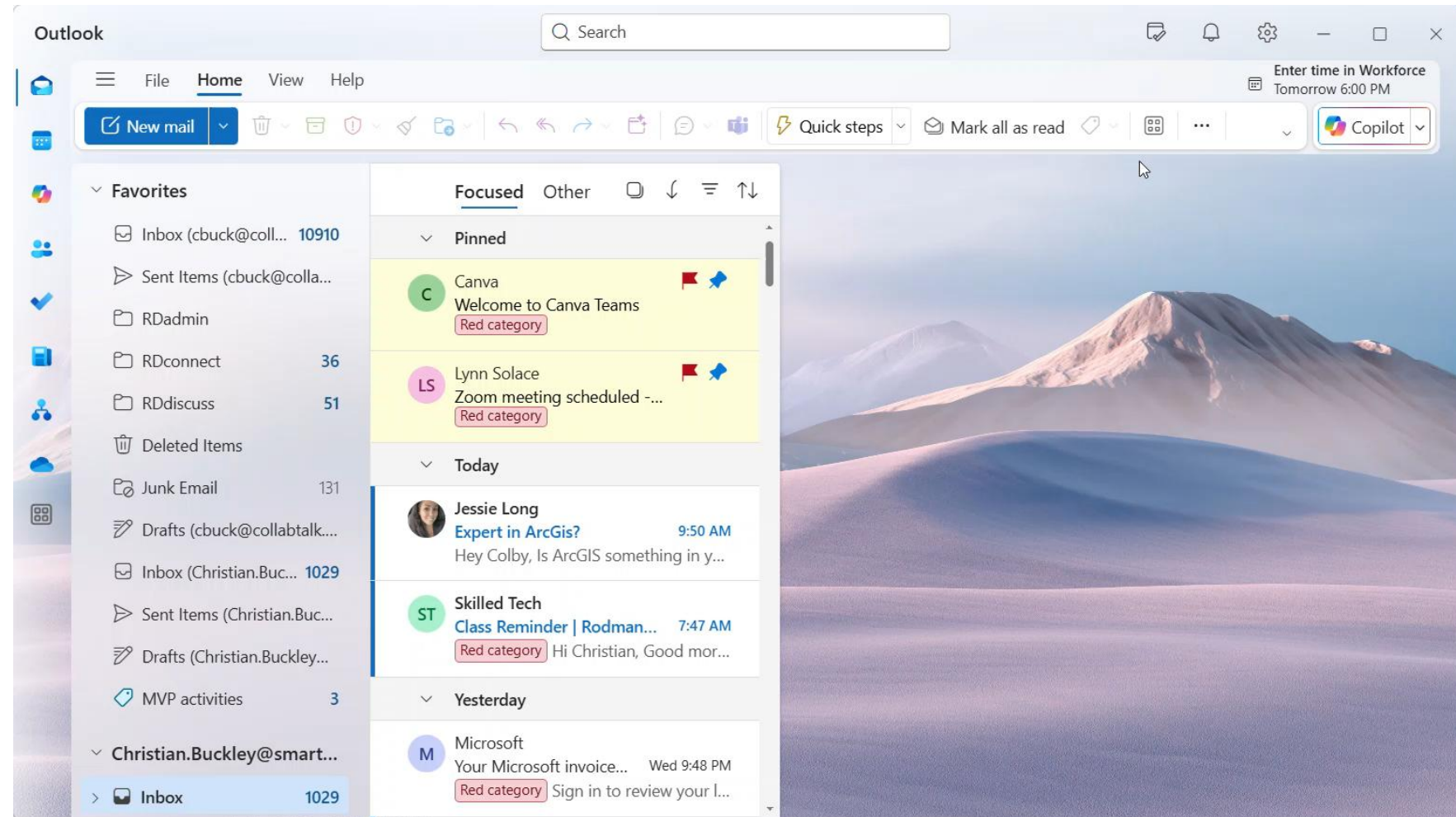


Do you find yourself creating similar email responses to common requests?

- Thank you for reaching out.
- Let's schedule a meeting.
- Here is this week's training schedule for the team.

You can add the My Templates app by going to the app launcher and searching for it, clicking Open, and confirming.

To start using the app, create a new email, click on Apps, and then select the My Templates app. A dialog box will open, and from there you can insert an existing template or create new templates.

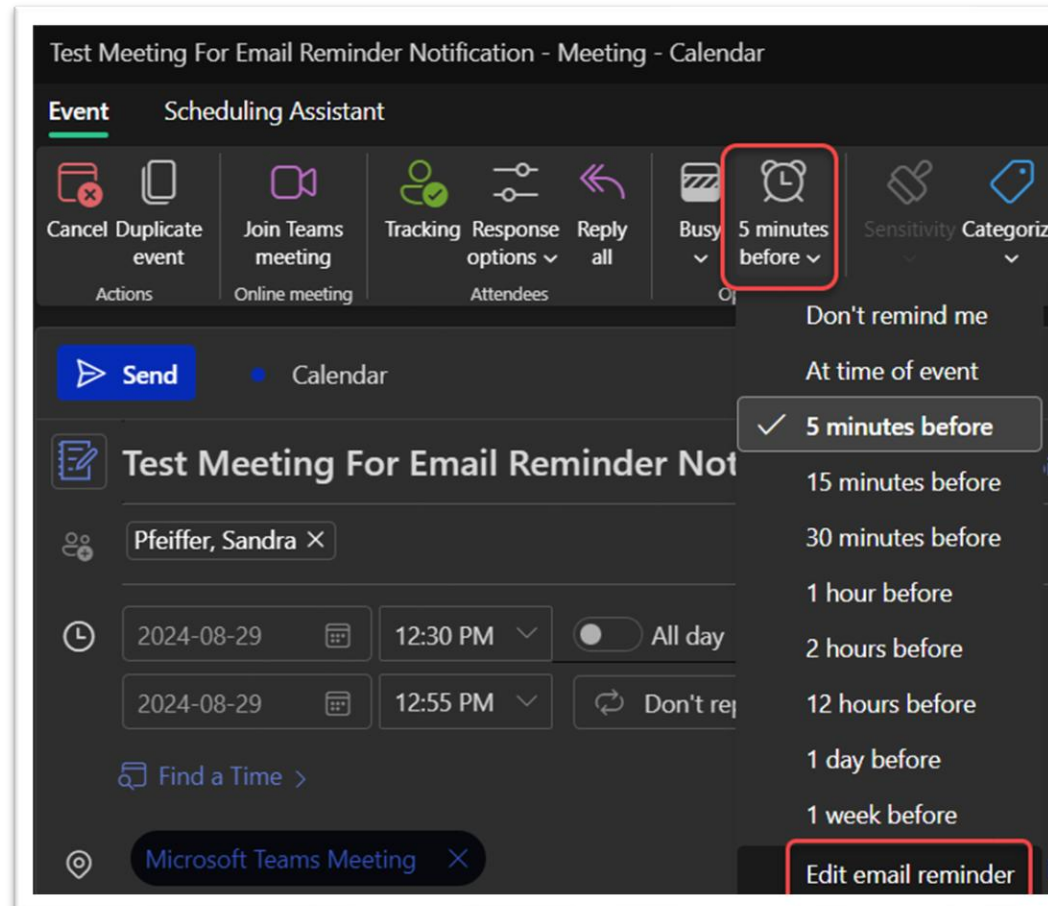


17. Sending meeting reminder emails from Outlook on the web



Sandra found a really cool feature that's somewhat buried in the calendar that you have on Outlook on the web. It's the ability to have Outlook ***send a reminder email*** to your attendees prior to your meeting based on whatever lead time you want! This is a really cool feature that takes meeting reminders up a notch. Here's how that works...

If you are setting up your meeting in the Outlook on the web calendar, click on ***Event > 5 minutes before > Edit email reminder***:



17. Sending meeting reminder emails from Outlook on the web



Now instead of having the attendee **just** get a pop-up reminder five minutes before the meeting, you can also have an email reminder sent to them before the meeting. In this case, I chose have a reminder email go out to **all attendees 1 day before** the meeting:

Email reminder ✕

Add an email reminder to stay on top of this event.

 Remind all attendees: 1 day before ▾

Hey! Make sure you come to this meeting!

☒ Send to attendees

Save

Discard

17. Sending meeting reminder emails from Outlook on the web



If I wanted, I could choose from a list of time frames for the reminder email, or I could use **Custom** to pick my own time frame:

Email reminder ✕

Add an email reminder to stay on top of this event.

Remind all attendees: 1 day before ▼

Hey! Make sure you...

☒ Send to attendees

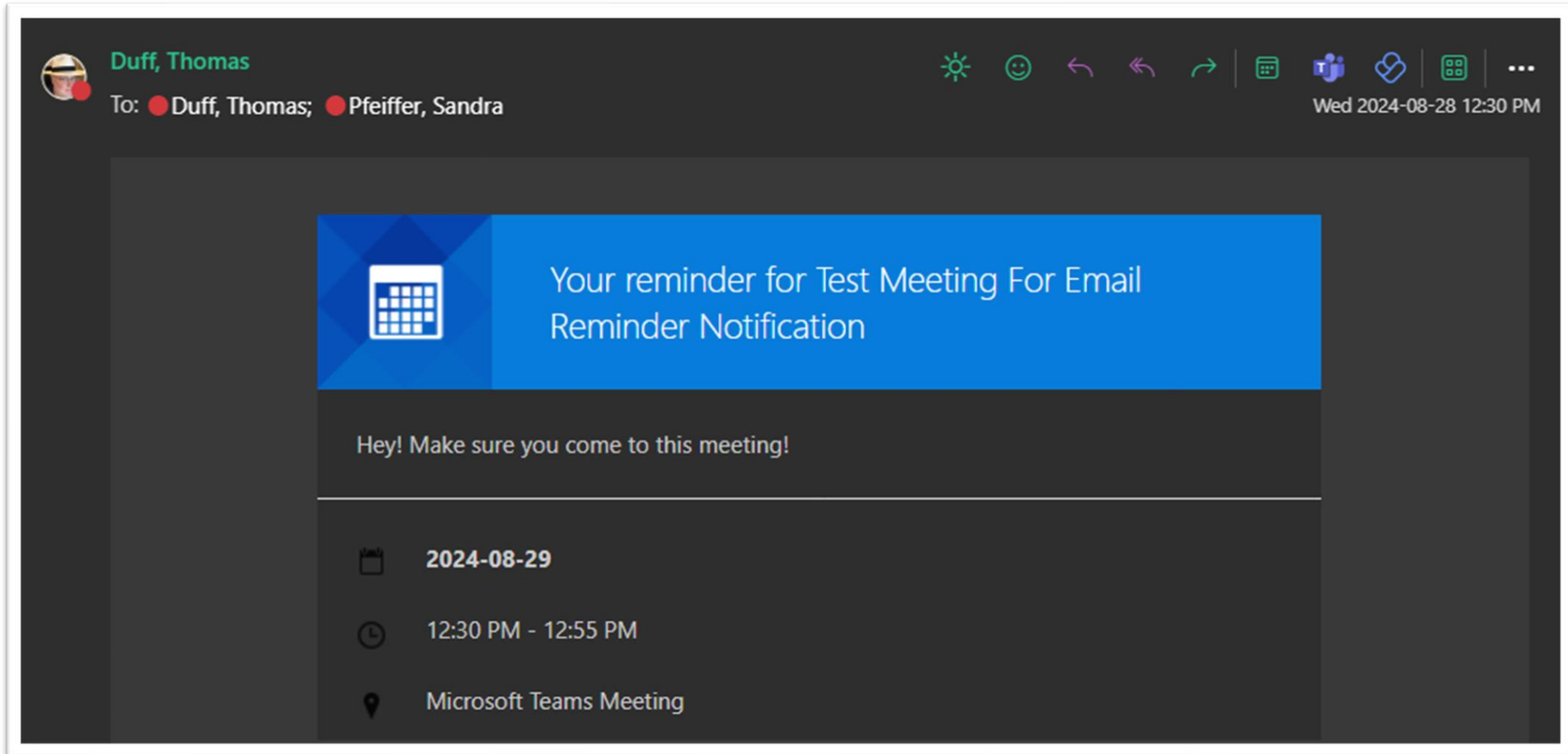
Save **Dismiss**

- At time of event
- 5 minutes before
- 15 minutes before
- 30 minutes before
- 1 hour before
- 2 hours before
- 12 hours before
- 1 day before**
- 1 week before
- Custom

17. Sending meeting reminder emails from Outlook on the web



In my example, here's the email I got one day before the meeting. The email went out exactly one day before the meeting, at the same time the meeting would be happening the next day:



This is a great feature to give people a heads-up on important meetings, and one that is not dependent on them getting the pop-up reminder a few minutes before the scheduled event.

18. Restore previous versions in File Explorer

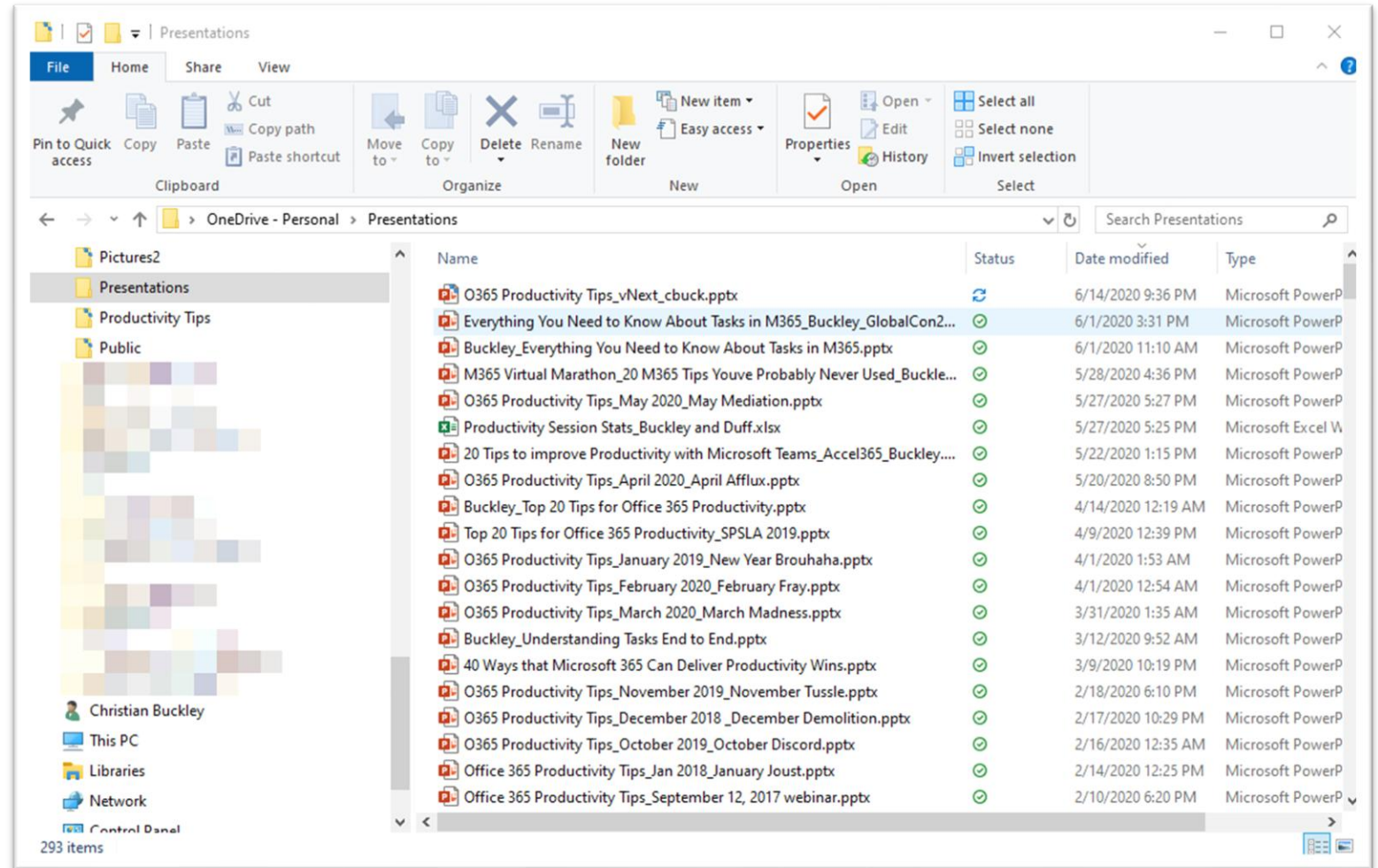


Did you know that you can view and restore versions of a document directly within File Explorer?

Sadly, Windows 11 did away with the desktop timeline feature.

When Microsoft announced their Windows Recall feature, users and pundits complained it was too much of a “Big Brother” capability.

But in File Explorer, we have the ability to jump backwards in time into previous versions of our files.



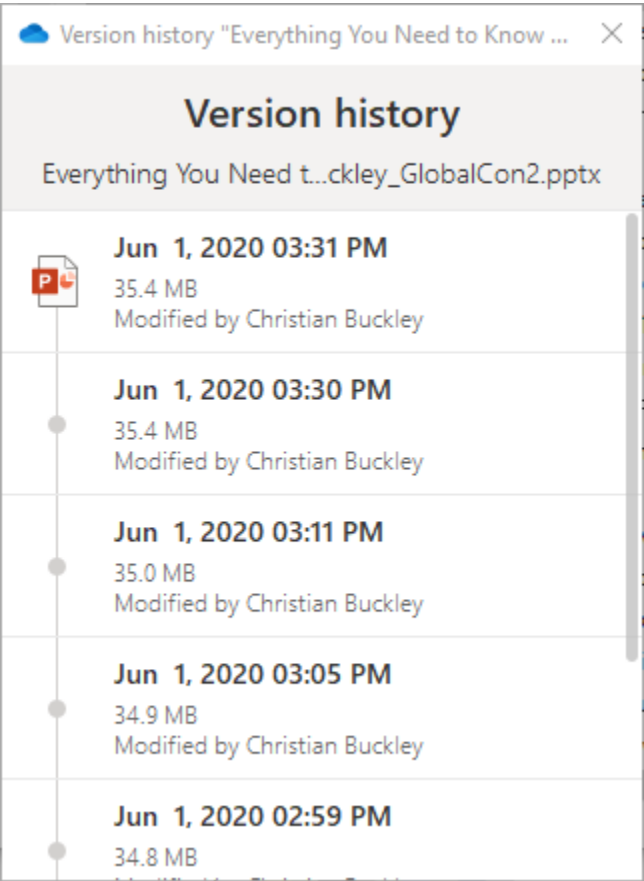
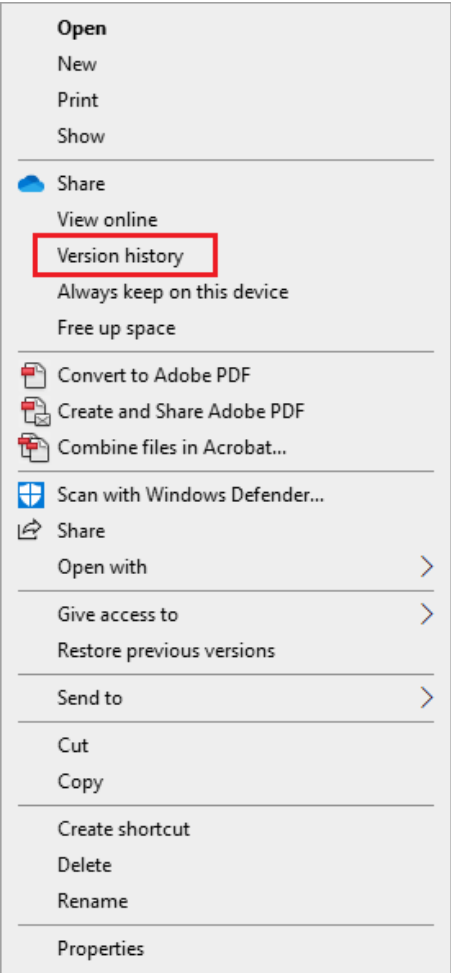
18. Restore previous versions in File Explorer



Why should you care? Sometimes you're hours into edits and realize that you accidentally deleted some key content or images. With this feature, you can jump back into an older version and correct your mistakes.

To access the version history, simply right click on the file name, and from the menu dialog, select **Version History**

The version history dialog opens, allowing you to scan through your various versions and open the right version.



19. Combining Excel columns with the ToCol function



Tamara (my wife) called me into her office yesterday to share this tip she just learned, and it's pretty cool. Have you ever had multiple columns in Excel that you wanted to combine into a single column without copying and pasting? You can do that with the **ToCol (To Column) function**. Here's how that works...

In this example, I have two columns of names, along with a few blank cells mixed in. I'd like to get all of those to show up in a single combined column without the blank cells...

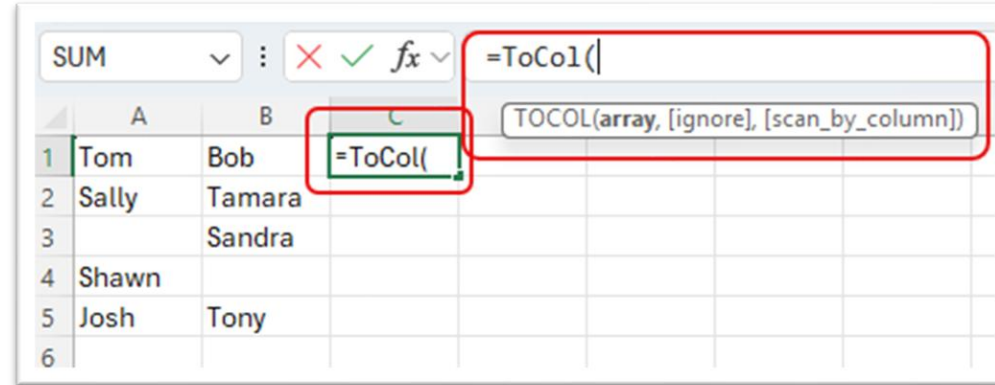
The screenshot shows an Excel spreadsheet with columns A, B, C, D, and E. Columns A and B contain names, with some blank cells. Column E is highlighted in green, indicating it is the target for the ToCol function. A red box highlights the data in columns A and B, rows 1 through 5.

	A	B	C	D	E
1	Tom	Bob			
2	Sally	Tamara			
3		Sandra			
4	Shawn				
5	Josh	Tony			

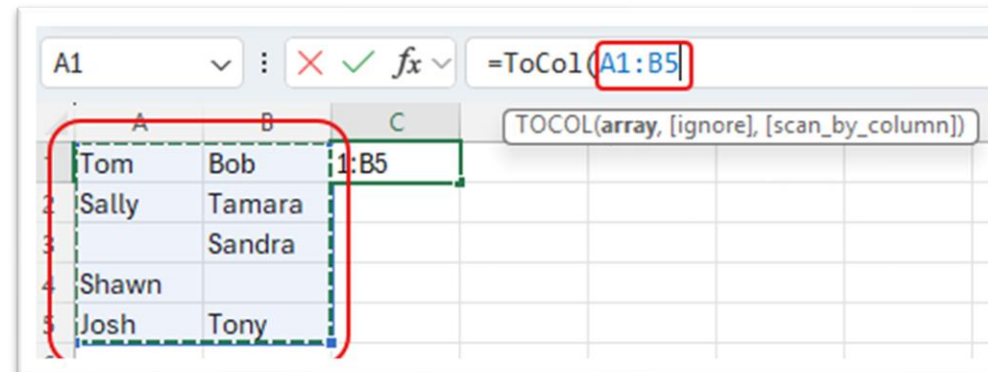
19. Combining Excel columns with the ToCol function



I put my cursor in cell C1 and in the function bar I typed **=ToCol(**. That provided me the type-ahead format of the function:



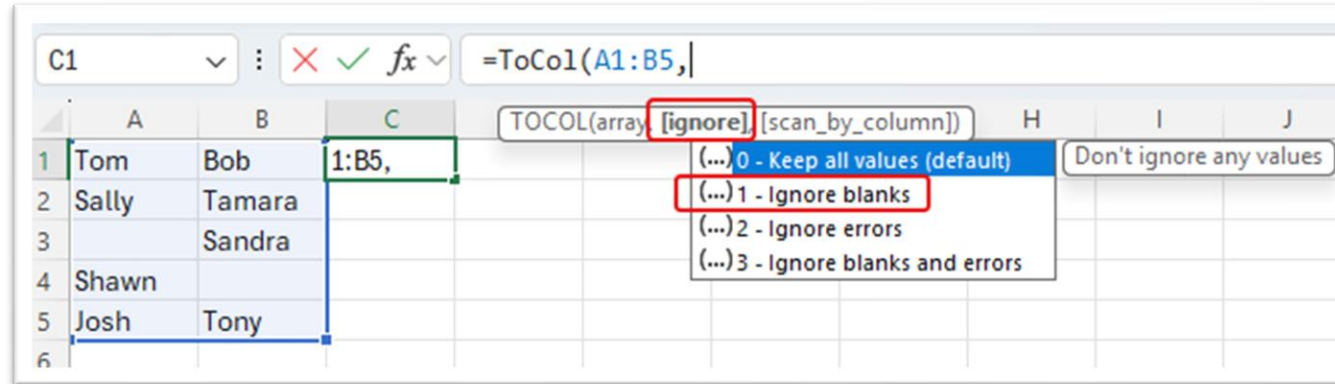
To get the **array** value, I highlighted the content in the two columns. That automatically filled in **A1:B5** for the array value:



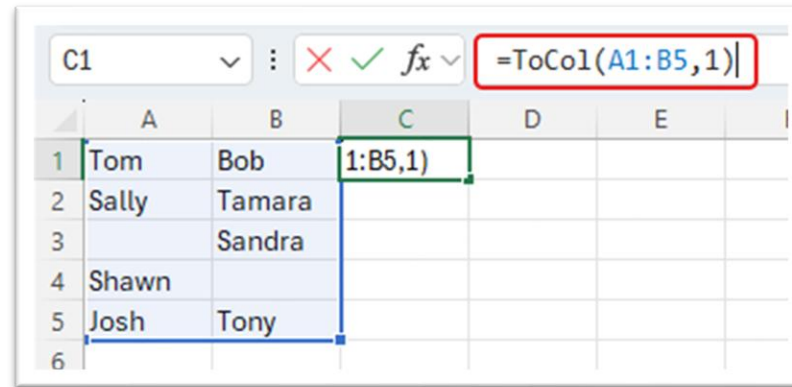


19. Combining Excel columns with the ToCol function

Next, I added a **comma** to the function to get the **ignore** values. By using the value of **1**, the function ignores all the blank cells:



I then added the closing parenthesis and pressed **Enter**:



19. Combining Excel columns with the ToCol function



Column C now has the combined list of all the names found in columns A and B!

	A	B	C	D	E
1	Tom	Bob	Tom		
2	Sally	Tamara	Bob		
3		Sandra	Sally		
4	Shawn		Tamara		
5	Josh	Tony	Sandra		
6			Shawn		
7			Josh		
8			Tony		
9					

20. Using the Game Play pattern

This pattern turns a prompt into an interactive or playful experience.

Use it for quizzes, simulations, or training exercises that mimic game mechanics.

This pattern is awesome for teams trying to build prompt literacy, or anyone who wants to sharpen their skills in a more engaging way.



We are going to play a game involving prompt engineering. You are going to give me a single task that can be accomplished via prompting. Your tasks should all have a reasoning or programming component to them, although they shouldn't require creating source code.

I will try to write a prompt for you to solve the task. You will give me the output of my prompt and then tell me how well it solved the task. Ask me questions until I tell you to stop. You will ask me a question, wait for my response, and then ask me another question after you tell me how I did.

Ask me the first question.

Take this simple note:

“Reminder: Beth to send slides by EOD Friday.”

Your job: write a prompt that extracts the **task**, **owner**, and **due date** in a clear table (Markdown, 3 columns). Assume today is Wednesday, September 17, 2025 (America/Chicago), and “EOD Friday” means 2025-09-19.

First question:

What's the exact prompt you'd give the AI to turn that note into the required table?



20. Using the Game Play pattern



Create a markdown table with 3 columns to track task, owner, and due date. Use today's date as a baseline, and assign all tasks based on weekdays and normal business hours Central Time. Prompt me for a single line of data, and then parse that data and add to the markdown table. Ask me for inputs until I say STOP. with each new input, organize/prioritize the list by due date.

Thought for 24s

Here's the result of running your prompt on the note:

Task	Owner	Due Date
Send slides	Beth	2025-09-19

How you did: Solid start—concise loop design and CT/weekday guardrails. Two quick gaps to tighten next time: you didn't force a specific date format or define relative-time rules (e.g., "this Friday" vs. "next Friday," "EOD" = 5pm CT), so different models might interpret inconsistently. Also, you didn't say how to normalize task phrasing (e.g., strip "Reminder:").

20. Using the Game Play pattern



Remind Jonathan to review the courseware and provide his feedback by Sept 23rd, as Phil needs to complete the course and have it in production by the 25th

Thought for 16s

Here's your updated table, sorted by due date:

Task	Owner	Due Date
Send slides	Beth	2025-09-19
Review courseware and provide feedback	Jonathan	2025-09-23

How you did: Nice! You correctly inferred the actionable task for Jonathan and normalized the casual "Sept 23rd" into a concrete date. One limitation: your prompt didn't specify what to do with secondary deadlines (Phil's 9/25 dependency), so it was ignored. If you want those captured in future, add a rule like "if a line contains multiple actionable items, create separate rows."

My question: Got another single-line note for the table, or type **STOP**?

20. Using the Game Play pattern



Additionally, you can ask Copilot to provide its own response. Simply ask “How would you respond? Create a 10/10 prompt to demonstrate what a perfect prompt might look like.

Copilot will come back with a “perfect” example and explain why it was good.

You missed the second part of that input, and should parse it for a secondary task

Thought for 31s

You’re right—I should’ve split that into two tasks. Added Phil’s item and re-sorted:

Task	Owner	Due Date
Send slides	Beth	2025-09-19
Review courseware and provide feedback	Jonathan	2025-09-23
Complete course and publish to production	Phil	2025-09-25

How you did: Much better. The note actually contained two actionable items owned by different people on different dates. Your original prompt didn’t instruct the model to split multi-owner inputs, so it treated the second part as context. To lock this in, add: “If an input line includes multiple owners or deliverables, create separate rows for each and preserve dependencies if implied.”

My question: Got another single-line note to add, or type **STOP**?



That's 20, folks!
Thank you!



