



SharePoint Beginners Checklist

Essential Actions to Learn



1. Navigating SharePoint

- ☐ Understand the difference between SharePoint, OneDrive and Teams
- ☐ Learn how to access SharePoint Online through Microsoft 365
- ☐ Navigate between sites, libraries and lists
- ☐ Use the SharePoint search bar effectively



2. Managing Documents & Libraries

- ☐ Upload, download, and open documents
- ☐ Create, rename, and delete files and folders
- ☐ Use version history to restore previous document versions
- ☐ Share documents with colleagues using links and permissions
- ☐ Sync SharePoint libraries to OneDrive for easy access



3. Using Lists & Metadata

- ☐ Create a new list and add columns (text, date, choice, etc.)
- ☐ Filter and sort lists to find information quickly
- ☐ Edit and update list items
- ☐ Use metadata to categorise and find documents easily



4. Collaborating with Others

- ☐ Co-author documents in real time using Office Online
- ☐ Set up alerts to be notified of document changes
- ☐ Use comments and @mentions in documents
- ☐ Check documents in and out when needed



5. Basic Permissions & Access

- ☐ Understand site permissions (view, edit, full control)
- ☐ Share files and folders securely without over-sharing
- ☐ Check who has access to a document or library



6. Customising SharePoint for Efficiency

- ☐ Create and customise views in document libraries and lists
- ☐ Add and arrange web parts on a SharePoint page
- ☐ Save personal views to make navigation easier
- ☐ Bookmark important SharePoint pages and libraries



FINAL CHECK: If you can confidently complete these tasks, you are well on your way to becoming proficient in SharePoint!