



Office 365 Skills Checklist

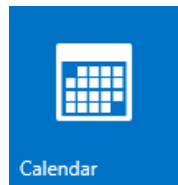
Are you a beginner, intermediate or advanced O365 user?

Our skills checklists will help you find out! Each checklist outlines the key skills for using O365 tools at a beginner, intermediate or advanced level. These checklists can be used to assess your readiness to transition to O365 and/or guide your learning and development.



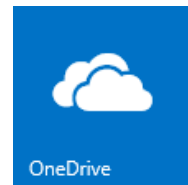
Mail

Outlook



Calendar

Outlook Calendar



OneDrive

OneDrive



Word Online

Word Online



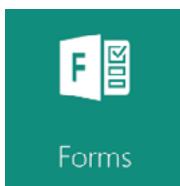
Excel Online

Excel Online



PowerPoint Online

Powerpoint Online

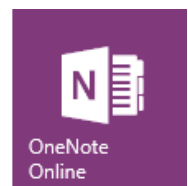


Forms

Microsoft Forms



Edge Browser



OneNote Online

OneNote Online

Outlook

Skill/Task	Details	I can do this
BEGINNER		
Compose an email with formatted text	<ul style="list-style-type: none"> • Compose a new email. • Change the font, size, colour and alignment of text. • Use bulleted and numbered lists. 	
Add attachments/files to an email	Add attachments from your computer and insert files from OneDrive.	
View and download attachments	<ul style="list-style-type: none"> • View an attachment without downloading it. • Download an attachment to your computer. 	
Create a folder	Create a new folder and give it a name.	
Move an email to a folder	File an email into a folder.	
Perform a basic search	Find emails by using the search box.	
Change the theme	Select a theme for your Outlook window.	
Add an email signature	Access Outlook settings and configure your email signature.	
Delete an email	Move an email to the Deleted Items.	
Create a contact	Create a new contact in the address book.	
Work effectively with email conversations	<ul style="list-style-type: none"> • Expand/collapse all emails in a conversation. • Forward, reply to and delete specific emails in a conversation. • Change the subject of a reply to create a new conversation. 	
INTERMEDIATE		
Compose a message with hyperlinks and images	Hyperlink text in an email. Insert an image inside the email.	
Use Categories	Apply a category to an email and view categories.	
Perform an advanced search	Use search tools to access advanced find options.	
Configure basic settings	Use advanced view settings to customise the look and feel of your inbox. <ul style="list-style-type: none"> • New item. • Out of Office Auto Reply/Vacation message. 	
Create a contact group	Create a new contact group in the address book. Add contacts to the group.	
Conversation History	Access your conversation history including chat from Skype for Business.	
ADVANCED		
Create mail filters	Create filters to automatically perform an action on incoming mail (e.g. move to a folder, forward).	
Add Ins	Access the store and use add-ins.	
Access shared mail accounts	[Only if required] Access email accounts that you have been given delegate access to.	
Access Outlook from a mobile device	Configure and use the Outlook app for iOS or Android.	

Outlook

Skill/Task	Details	I can do this
ADVANCED		
Folders	Show folder in favourites and / or set rules for folder.	
Request a read receipt	Enable read receipts on email.	

Outlook Calendar

Skill/Task	Details	I can do this
BEGINNER		
Change the calendar view	Toggle between day, week, month, custom and schedule view.	
Show/hide a calendar	Show or hide entries for a calendar.	
Change calendar colour	Change the colour of a calendar (changes the colour of calendar entries).	
Create an event at a specific time	Create a new calendar event for a specific date and time, including a title and description.	
Create a repeating event	Create a calendar event that repeats daily, weekly, monthly, yearly etc.	
Create an all-day event	Create a calendar event for a specific day (displays at the top of the calendar).	
Respond to a calendar invitation	Accept or decline a calendar invitation from another person.	
Delete an event	Delete an event in your calendar.	
INTERMEDIATE		
Create a reminder	Create a reminder for a specific day or date and time.	
Create a calendar	Create a new calendar, separate from your own (primary) calendar.	
View a colleague's calendar	View a colleague's calendar in the 'shared calendars' section.	
Invite people to an event	Add guests to a calendar event and send them invitations.	
Add a location or room to an event	<ul style="list-style-type: none"> • Add a place or address as the event location. • Book a room at your organisation (if available). 	
Add attachments to an event	Add attachments from your computer or OneDrive.	
Configure basic settings	Access Outlook Calendar settings and configure: <ul style="list-style-type: none"> • Date and time format. • Notifications. • Week starts on. • Weekends display. 	
Share your calendar	Give another person access to view or edit your calendar.	
ADVANCED		
Add appointment to OneNote	[Only if required] Create appointment link to OneNote.	
Add a video call to an event	Add a video call to a calendar event to make it a video meeting using Skype For Business [Only if required/available].	
Check guest availability	Use the 'schedule assistant' feature to check guest availability when you are creating an event.	
Add a response note	Add a note when you respond to an event.	
Propose a new time	Propose a new time for an event you have been invited to.	

Outlook Calendar

Skill/Task	Details	I can do this
ADVANCED		
Configure notification settings	Access and configure the default notification settings for each of your calendars.	
Configure and use add ins	Access Outlook settings and enable useful add ins [Only if required/available].	
Access Google Calendar from a mobile device	Configure and use the Outlook Calendar app for iOS or Android.	
Add OneNote notes	Share meeting notes with calendar.	
Customise View	Save current view to suit your needs.	
Meeting poll	Use meeting poll to determine the best time to meet.	
Suggest a time feature	Use suggest a time to find a time for all team members to meet.	

OneDrive

Skill/Task	Details	I can do this
BEGINNER		
Change between list and grid view	Toggle between viewing files and folders in a list or grid view.	
Create a folder	Create a new folder in OneDrive.	
Access a shared file or folder	Access a shared file or folder via Shared with Me.	
Perform a basic search	Find files by using the search box.	
Upload a file	<ul style="list-style-type: none"> • Upload a Word file from your computer. • Upload a PDF from your computer. 	
Download a file	Download a file from OneDrive to your computer.	
Share a file or folder with specific people	Allow others to view or edit files or folders in your OneDrive by sharing them with their email address.	
Delete a file	Move a file to the Recycle Bin.	
INTERMEDIATE		
Configure settings	Access OneDrive settings and configure: <ul style="list-style-type: none"> • Language settings. • Notifications. 	
View file/folder details	Use the 'View details' pane to see activity on a file/folder and details of its location, owner and access permissions.	
Perform an advanced search	Use search options to perform an advanced search (e.g. by file type, owner, when modified, etc.).	
Make a copy of a file	Make your own copy of a file that is owned by someone else.	
Upload a folder	Upload a folder and its contents from your computer.	
Share a file or folder using a link	Get a sharable link that lets people inside or outside (if available) your domain/tenant access a file or folder.	
ADVANCED		
Manage file revisions	Manage file versions that are stored in OneDrive.	
Use desktop sync mode	Access OneDrive settings and enable desktop sync (on your own computer only).	
Access OneDrive from a mobile device	Configure and use the OneDrive app for iOS or Android.	
Permissions	<ul style="list-style-type: none"> • Modify permissions of documents within a shared folder. • Set expiration dates on shared items. 	
Use the discover tool	Use discover to locate files.	
Pin a document	Increase efficiency by pinning a document to your home page.	

Word Online

Skill/Task	Details	I can do this
BEGINNER		
Create a document	Create a Word document and give it a name.	
Basic formatting	<ul style="list-style-type: none"> Change the font, size, colour and alignment of text. Use bulleted and numbered lists. 	
Use tables	Insert a table into a document and add/delete rows and columns.	
Insert and resize images	Insert an image from your computer, OneDrive or the web.	
Change page setup	<ul style="list-style-type: none"> Change the page orientation and size. Adjust page margins. 	
Share a document with specific people	Allow others to view, edit on a Word Doc by sharing it with their email address.	
Insert a comment	Insert a comment into a document to communicate with other collaborators.	
Email collaborators	Use the email everyone function to send an email about a document to all the people it is shared with.	
Print a document	Print a document and change print options.	
INTERMEDIATE		
Make a copy of a document	Make your own copy of a document that is owned by someone else.	
Open in Word	Open and collaborate in document using Word on the desktop.	
Change cell colour	Change the background colour of table cells.	
Insert hyperlinks	Add a hyperlink to text or an image.	
Insert special characters	Add special characters to a document.	
Insert page numbers	Add page numbers to a document.	
Insert a header and footer	Add a header and footer to a document and configure options.	
View the reading view	Turn on the document reading view to assist with reading.	
Use the Learning Tools	Use the Immersive reader to: <ul style="list-style-type: none"> Convert text to speech. Change the view to assist in reading. Highlight grammar and directions within the text. 	
Share a document using a link	Get a sharable link that lets people inside or outside (if available) your domain access your document. Setup expiry time to prevent access beyond a specific date.	
Use revision history	View the history of document changes and restore previous version of a document.	
Export the document in other formats	Download a document as a PDF file or other file type.	

Word Online

Skill/Task	Details	I can do this
ADVANCED		
Use and change heading styles	Use heading styles (e.g. Title, Heading 1, Heading 2 etc.) to consistently format text in your document. Update these styles to match your organisation's requirements.	
Change line spacing	Adjust the spacing of lines and paragraphs.	
Images and Text	Change formatting of text when inserting images.	
Change table borders	Adjust the width and colour of table borders, including removing them.	
Navigation Pane	Linking to headings within the document to form a table of contents.	
Insert a footnote	Add a footnote to a word or sentence.	
Configure advanced sharing settings	Modify advanced sharing settings.	
Install and use add-ons	Install useful add-ins and use them to extend the functionality of Word Online [Only if required/available].	

Excel Online

Skill/Task	Details	I can do this
BEGINNER		
Create a sheet	Create a Excel workbook and give it a name	
Insert and rename tabs	Insert new tabs (worksheets) and rename them.	
Basic text formatting	<ul style="list-style-type: none"> • Change the font, size, colour and alignment of text. • Use bulleted and numbered lists. 	
Basic cell formatting	<ul style="list-style-type: none"> • Change cell borders. • Change cell shading. 	
Freeze panes	Freeze header columns and rows to prevent them from moving when you scroll down.	
Share a sheet with specific people	Allow others to view, edit or comment on a Google Sheet by sharing it with their email address.	
Insert a comment	Insert a comment into a sheet to communicate with other collaborators.	
Email collaborators	Use the email everyone function to send an email about a sheet to all the people it is shared with.	
Print a sheet	Print a sheet and change print options.	
INTERMEDIATE		
Make a copy of a spreadsheet	Make your own copy of a spreadsheet that is owned by someone else.	
Import data from existing sheets	Import data from an existing Excel or CSV file.	
Use number formats	Format the style of numerical data (e.g. currency, percent).	
Insert charts	Create a chart based on a data set.	
Insert hyperlinks	Add a hyperlink to text or an image.	
Use basic functions (formulas)	Use formulas to perform basic calculations (e.g. add, subtract, average etc.).	
Sort data	Sort data in ascending or descending order.	
Use filters and filter views	Filter data by values or conditions.	
Use conditional formatting	Format cell colour and text based on a specific condition being met (e.g. cell contains a word or value).	
Share a sheet using a link	Get a sharable link that lets people inside or outside (if available) your domain access your spreadsheet.	
Use revision history	View the history of spreadsheet changes and restore previous version of a spreadsheet.	
Export the sheet in other formats	Download a sheet as an CSV, PDF file or other file type.	

Excel Online

Skill/Task	Details	I can do this
ADVANCED		
Use advanced functions (formulas)	Use formulas to perform advanced calculations or actions on data (as required).	
Customise charts	Edit chart settings, including: <ul style="list-style-type: none"> • Chart type and style. • Chart and axis titles. • Scales and legends. • Formats, fonts and colors. 	
Insert pivot tables	Use pivot tables to view and analyse large data sets.	
Name ranges	Assign names to ranges of data.	
Protect sheets and ranges	Protect cells, ranges and whole sheets from being edited by collaborators.	
Install and use add-ons	Install useful add-ons and use them to extend the functionality of Excel [Only if required/available].	
Flash Fill	Use the Flash Fill function to automate work flow.	

Powerpoint Online

Skill/Task	Details	I can do this
BEGINNER		
Create a slide deck	Create a PowerPoint presentation and give it a name.	
Select a theme	Choose a theme for a slide deck when prompted during creation.	
Change slide layout	Choose an appropriate layout for a slide, e.g. Title slide, Title and body, Title and two columns.	
Insert and delete slides	Add extra slides to the slide deck. Delete slides that are not required.	
Duplicate slides	Make a copy of an individual slide in the deck.	
Basic text formatting	<ul style="list-style-type: none"> • Change the font, size, colour and alignment of text. • Use bulleted and numbered lists. 	
Insert and resize images	Insert an image from your computer, OneDrive or the web.	
Use tables	Insert a table into a slide and add/delete rows and columns.	
Share a slide deck with specific people	Allow others to view, edit or comment on a Powerpoint by sharing it with their email address.	
Insert a comment	Insert a comment into a slide deck to communicate with other collaborators.	
Email collaborators	Use the email everyone function to send an email about a sheet to all the people it is shared with.	
Present a slide deck	Present a slide deck, including using speaker notes.	
Print slides	Print a slide deck and change print options (including choosing slide handouts).	
INTERMEDIATE		
Make a copy of a slide deck	Make your own copy of a slide deck that is owned by someone else.	
Import slides	Use the Import tool to import slides from other Microsoft PowerPoint files.	
Change slide background	Change the slide background colour or image.	
Work with shapes and lines	Insert shapes or lines and change their size, fill and borders.	
Insert a video	Insert a video from YouTube or OneDrive.	
Insert a hyperlink	Add a hyperlink to text or an image to external locations.	
Share a slide deck using a link	Get a sharable link that lets people inside or outside (if available) your domain access your slide deck.	
Use revision history	View the history of slide changes and restore previous version of a slide deck.	
Export the slide deck	Download a slide deck as a PDF file, image or other file type.	

Powerpoint Online

Skill/Task	Details	I can do this
ADVANCED		
Design Ideas	Use design ideas tools.	
Add animations and transitions	Change the transition between slides and animate individual objects on a slide.	
Edit images	<ul style="list-style-type: none"> • Crop images. • Change formatting of image. 	
Work with objects	Order objects using tools on the 'Format' menu.	
Present	Display a slide deck as a full screen presentation with auto-advance.	

Microsoft Forms

Skill/Task	Details	I can do this
BEGINNER		
Create a form	Create a Microsoft Form and give it a file name.	
Add a form description	Use the description field to add information about the purpose or use of a form.	
Choose a theme	Change the default theme to something appropriate to a form's purpose.	
Add various types of questions	Create questions of each type (short answer, paragraph, multiple choice, rating, date and ranking).	
Make questions required	Toggle on the required option so respondents must answer the question.	
Preview a form	View a form as it will be seen by respondents.	
Send a form via email	Use the 'Send' option to distribute a form link to respondents via email.	
View form responses	View responses to a form from within the Forms interface.	
INTERMEDIATE		
Make a copy of a form	Make your own copy of a form that is owned by someone else.	
Duplicate a question	Make a copy of an individual question in a form.	
Add a description to a question	Add extra information to a question by using the description field (e.g. 'select all that apply').	
Add images to a question or answer	Insert images into questions or answer options.	
Insert videos	Add a video from YouTube.	
View form responses in a spreadsheet	Create an Excel Sheet which displays form responses.	
Configure basic settings	Access a form's settings and configure: <ul style="list-style-type: none"> • Collect email addresses. • Restriction to organisation. • Response limits. • Response access. 	
Make a self-grading quiz	Create a quiz. Specify correct answers and points value.	
Close form responses	Stop a form from accepting any more responses.	
Add collaborators to a form	Share a form with other people who need to collaborate on it.	

Microsoft Forms

Skill/Task	Details	I can do this
ADVANCED		
Use data validation	Restrict the type or amount of data that can be included in a question response.	
Use form branching	Automatically direct the respondent to specific sections in a form based on their answer to a multiple-choice question.	
Configure advanced settings	Access the form's settings and configure: <ul style="list-style-type: none"> • Questions shuffling. • Shuffling multiple choice options at question level. 	
Delete responses	Remove all existing responses from a form.	

Edge Browser

Skill/Task	Details	I can do this
BEGINNER		
Favorites website	Save a website to Favorites for quick and easy access.	
View browsing history	View a list of recently visited websites.	
View downloaded files	View a list of recently downloaded files.	
Print a web page	Print a web page and change print options.	
INTERMEDIATE		
Use InPrivate mode	Use an InPrivate window for a private browsing session.	
Organise favorites	Put favorites into folders.	
Configure basic settings	Access Edge settings and configure: <ul style="list-style-type: none"> • Favorites bar. • Download settings. • Startup options (e.g. home page). 	
Set Aside Tabs	Set Aside frequently used websites in Edge so they can be easily re-opened.	
Reading View	Use reading view to remove distractions from web pages.	
ADVANCED		
Sign-in to Edge	Sign-in to Edge with a Microsoft account to sync your favorites and reading list.	
Import Bookmarks	View and import bookmarks from other devices.	
Extensions	Add useful extensions to browser.	
Inking	Ink and note on web pages and send to OneNote [Only if required/available].	
Configure advanced settings	Access Edge settings and configure: <ul style="list-style-type: none"> • Privacy and security settings. • Passwords. • Languages. 	

OneNote Online

Skill/Task	Details	I can do this
BEGINNER		
Create a OneNote notebook	Create a notebook and give it a name.	
Sections	<ul style="list-style-type: none"> • Add a section and give it a name. • Change the colour of a section • Delete a section. 	
Pages	<ul style="list-style-type: none"> • Add a page and give it a name. • Delete a page. • Insert a subpage. • Change the colour of a page. 	
Basic formatting	<ul style="list-style-type: none"> • Insert text • Change the font, size, colour and alignment of text. • Use bulleted and numbered lists. 	
Use tables	Insert a table into a page and add/delete rows and columns.	
Insert and resize images	Insert an image from your computer, OneDrive or the web.	
Share a Notebook with specific people	Allow others to view, edit a notebook by sharing it with their email address.	
Email collaborators	Use the email everyone function to send an email about a sheet to all the people it is shared with.	
Print	Print a selected page.	
INTERMEDIATE		
Make a copy of a page/section	Make a copy of a page/section and insert it in the same or another notebook.	
Move a page/section	Move a page/section to another section or notebook.	
Change table cell colour	Change the background colour of table cells.	
Insert hyperlinks	Add a hyperlink to text or an image.	
Insert special characters	Add special characters to a document.	
Ink to Text	Ink on a page and convert to text.	
Audio	Insert audio on a page.	
Use the Learning Tools	Use the Learning Tools to: <ul style="list-style-type: none"> • Convert text to speech. • Change the view to assist in reading. • Highlight grammar and directions within the text. 	
Voice to Text	Write and format text using your voice. [Desktop version]	
Share a Notebook using a link	Get a sharable link that lets people inside or outside (if available) your domain access your notebook.	
Use revision history	View the history of notebook changes and restore previous versions.	
Export a page in other formats	Download a page as a PDF file or OneNote package. [Desktop version]	

OneNote Online

Skill/Task	Details	I can do this
INTERMEDIATE		
Use desktop version	Open and sync a Notebook to the desktop version of OneNote.	
Search	Use the search tool to find text within a notebook. [Desktop version]	
Insert objects	Add shapes, lines or text boxes to a page.	
ADVANCED		
Tags	Add tags and search for tags on the desktop version.	
Insert video	Insert a video using the desktop version.	
Searchable Images	Insert image and make it searchable.	
Voice to Text	Use the translate option to voice type in other languages. [Desktop version]	
OneNote Class Notebook	Create and set up a Class Notebook.	