

Your Everyday Microsoft 365 Management Checklist

Security

- ☐ MFA turned on for your account
- ☐ You can recognise a suspicious email before clicking
- ☐ You check link-sharing permissions before sending

Organisation

- ☐ You know the difference between your OneDrive and your team's SharePoint
- ☐ Your folders follow a consistent naming structure
- ☐ You know how to restore a previous file version

Troubleshooting

- ☐ You know what things to try yourself before calling for help
- ☐ You know how to check if a problem is affecting just you or the whole team
- ☐ You know who to contact and what to tell them

Common Problems Colleagues Bring to You

- ☐ You know what to do if a colleague can't find a saved file
- ☐ You know what to check if someone isn't receiving emails
- ☐ You know whether a Teams or app sign-in issue is a fix-yourself or escalate job
- ☐ You know how to check the Microsoft 365 service status before raising a support ticket

Confidence-Building

- ☐ You know where the free Microsoft 365 Training Centre is
- ☐ You've bookmarked one resource to revisit when you have time

Well done! By ticking off these items, you're building the everyday habits that keep your charity's Microsoft 365 systems running smoothly.

Remember, you don't need to be an IT expert. You just need consistent, practical habits around security, organisation, and knowing when to ask for help.

For anything beyond everyday management, Qlic IT is here to help.

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