Design Document: MS Publisher Basics

Class Description

Learn how to use Publisher to create projects like flyers, greeting cards, calendars, invitations, and more in this class.

**Curriculum Track**

Microsoft

**Audience**

Adults

**Class Length**

90 minutes

**Training Method**

Instructor-led hands-on

**Purpose**

To introduce new users to the basic terminology and functionality of Microsoft Publisher 2013

Equipment Requirements

Projector and projection screen, computers with internet connections for instructor and participants, laser pointer (recommended)

Software Requirements

Windows 7, Microsoft Publisher 2013

Material Requirements

Pens or pencils, activity sheets, handouts, participant surveys

**Learning Objectives**

At the end of the session, learners will be able to:

* Access Microsoft Publisher
* Identify and define basic elements of Microsoft Publisher
* Know where to find commonly used commands in The Ribbon and Tabs
* Create, edit, save and print a basic document

**Assessment Technique(s)**

Successful completion of class activities

Content Outline

**Agenda (2 mins.)**

* Outline the following topics that will be covered in class:
  + Terminology & Descriptions
  + Accessing Publisher
  + Creating & Opening Documents
  + Saving Documents
  + Basic Elements
  + Commonly Used Tabs - Home, Insert, Page Design & View tabs
  + Editing Basic Content in a Template

**Topics, Talking Points, and Activities (85 mins)**

* Terminology & Descriptions
* Define the following terms and illustrate each one with a graphic or screenshot/call-out box:
  + **The Ribbon:** The area at the top of the screen where commands are organized into **Tabs**, icons, and **Groups**
  + **Tabs:** The areas within the Ribbon where like features are organized. The 7 main Tabs include **File, Home**, **Insert**, **Page** **Design**, **Mailings**, **Review** and **View**
  + **Groups:** The areas within Tabs where related task functions—like adjusting the Page Setup—are organized
* Accessing Publisher
  + Explain how to access Publisher from the **Start** menu using the following steps:

1. Click on the **Start** menu in the lower left-hand corner of the screen
2. Click on **All programs**
3. Click on **Microsoft Office**
4. Click on **Publisher 2013**

* If applicable, explain that at your library, users can access Publisher by clicking on a desktop icon located on the main screen
* Creating & Opening Documents
* Explain that once Publisher is opened, you have a choice of creating a new, blank document or selecting a template. For the purposes of this class, you will use a template.
* Demonstrate how to select a template by browsing through the categories
  1. Click the **Built-In** option
  2. Click on the **Flyers** category
  3. Under the **Event** section at the top, click **All Event**
  4. Select the first template available (it should be the **Arrows** template)
  5. Click the **Create** button
* Explain that at times you’ll need to create a new document or open another one. Show the steps for creating a new document as you explain them:

1. Click on the **File** tab
2. Click on **New**
3. Select the type of document you want to create (for purposes of this demonstration, you do not have to create a new document since you already have one open)

* Mention that to open an existing document, the steps are a little different. Demonstrate the process as you outline the following:

1. Click on the **File** tab
2. Click on **Open**
3. Click the drive or folder that contains the desired document (e.g., desktop, documents, etc.)
4. Click on the desired document
5. Click on the **Open** button (for purposed of this demonstration, you do not have to open an existing document since you already have one open)

* Also share that Publisher keeps a list of the most recently-accessed documents and will display those in the menu under the **Recent Documents** area

**ACTIVITY:** Have participants complete **Activity #1** on the *Activity Sheet*

* Saving Documents
* Explain to participants that the first time they save a document in Publisher they should **Save As** so they can select the location where they want the file to reside
* Walk them through the following steps to save a document using the **Save As** feature:

1. Click on the **File tab**
2. Click on the **Save As** option
3. Double-click on the Computer icon to show all available drives and locations
4. Click on the one where you want to save the document (e.g. desktop, documents, etc.)
5. Click inside the **File Name** box (if it’s not already highlighted) and type in a file name
6. Click on the **Save** button

* Share that after a document has been saved, users can quickly save additional changes to it by clicking on the **Save** button in the **Quick Access Toolbar**

**ACTIVITY:** Have participants complete **Activity #2** on the *Activity Sheet*

* Basics Elements
  + With the flyer template open, explain and demonstrate the following elements of the program window
    - **Document Window –** Displays the current document when you open Word
    - **Title Bar –** Displays the document name; located in the top-middle area of the window
    - **Quick Access Toolbar –** Includes buttons for saving documents, un-doing, repeating, and printing; located in the upper left-hand corner of the window
    - **Status Bar –** Shows the number of pages and words in a document as well as view buttons and the zoom slider; located in the bottom toolbar of the document window
    - **Zoom Slider –** Increases or decreases the document size using the plus or minus sign on the slider bar; located in lower right-hand corner of the document window
    - **Horizontal and Vertical Rulers –** Displays document margins, tab settings, and paragraph indentations; located across the top and along the left side of the document window
    - **View Buttons –** Changes the view of the current document from **Single Page** view to **Two-Page Spread**; located to the left of the zoom slider
    - **Minimize, Restore Down & Close Buttons –** Makes the current document smaller, larger, or closes it; located in the upper right-hand corner of the window
      * **Minimize (-)-** Keeps document open but moves it off of the screen and into the System Tray at the bottom of the window; to access the document again, users click on the document’s icon in the System Tray
      * **Restore Down / Maximize-** Reduces document to appear in half-screen view; to access the document again, users click the window icon again
      * **Close (X)-** Closes the document and prompts the user to save changes
* **Scroll Bar and Arrows –** Allows users to scroll up or down in the document; located on the far right side of the document window
* **File** tab **–** Includes commands to save, open, and print documents; click on the tab to access the options. Briefly go over printing options.
* **Dialog Box Launcher –** Allows users to access additional commands in each Group; click on the downward-facing arrow in the lower right-hand corner of a Group to access the options

**ACTIVITY:** Have participants complete **Activity #3** on the *Activity Sheet*

* Highlight Commonly Used Tabs - Home, Insert, Page Design, and View
* Explain the Publisher, like other Microsoft Office programs share the same set-up with tabs. If one is familiar with MS Word then finding commands in Publisher will be easy.
* Explain that Publisher contains seven tabs plus the **File** tab
* Share that each tab includes Groups that allow users to perform specific tasks for related functions, like manipulating paragraphs or adjusting fonts
* Click on each of the Tabs below and give a high-level overview of each of its Groups as well as some key functions:
* **Home** contains the following Groups related to basic document editing:
  + **Clipboard** (cutting, copying, and pasting)
  + **Font** (bold, underline, font style, font size, font color)
  + **Paragraph** (bullet points, numbers, indentations, tabs)
  + **Styles** (format text with pre-defined styles made for headings, emphasis, titles, & others)
  + **Objects** (work with objects)
* **Insert** contains the following Groups related to inserting items into a document:
  + **Pages** (insert a cover page, an extra page, or a page break)
  + **Tables** (add a table)
  + **Illustrations** (insert a picture, shape, chart, or screenshot)
  + **Building Blocks** (insert page parts and accents)
  + **Text** (add a text box, word art, date and time stamp, etc.)
  + **Links** (insert a hyperlink, bookmark, or cross reference)
  + **Header & Footer** (insert page numbers and a header or footer)
* **Page Design** containsthese Groups related to the visual presentation of a document:
  + **Page** **Setup** (set margin size and document orientation)
  + **Layout** (use design guides)
  + **Pages** (delete, move, or rename pages)
  + **Schemes** (add a color/font theme)
  + **Page Background** (add a watermark, colored background, or a border)
  + **View** containsthese Groups related to how the document looks on your screen:
* **Views** (Normal or Master Page)
* **Layout** (view one or two pages at a time)
* **Show** (make rulers, guides, and boundaries visible)
* **Zoom** (zoom in or out, view the page as a whole)
* **Window** (work with multiple files at once)

**ACTIVITY:** Have participants complete **Activity #4** on the *Activity Sheet*

* Editing Basic Content
* With your flyer open, demonstrate how to edit the text in the template
* Make the following changes to the flyer. If necessary, use the zoom slider to zoom in so it is easier to see.
  1. In the **Business Name** box, type **ABC Company**
  2. Change the font style and size to one of your choice.
  3. In the **Product/Service Information** box, type **New Product Coming Soon!**
  4. Change the font style and size to one of your choice
  5. In the **Description** box, type **Join us on June 15th for a preview of our latest and greatest!**
  6. Change the font and size to one of your choice

**ACTIVITY:** Have participants complete **Activity #5** on the *Activity Sheet.*

Once participants have finished, have them complete **Activity #6** and **Activity #7** on their own, if time permits. If there is not enough time in class, mention that they can complete these activities at the library outside of class or at home (if they have the software).

**Wrap Up/Closing (3 mins.)**

* Highlight the upcoming technology classes and share the types of topics that will be covered
* Ask if there are questions and answer any that were “parked” during the session
* Thank participants for coming and ask them to complete the class survey before leaving