Design Document: MS Word Basics

Class Description

Learn how to create text-based documents using Microsoft Word, as well as how to complete simple actions like saving, opening, and printing documents in this class.

**Curriculum Track**

Microsoft Tools

**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 Word 2013

Equipment Requirements

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

Software Requirements

Windows 7, Microsoft Word 2013

Material Requirements

Pens or pencils, presentation, activity sheets, handouts, participant surveys

**Learning Objectives**

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

* Access Microsoft Word
* Identify and define basic elements of Microsoft Word
* Locate features within Tabs & Groups
* Create, edit, and save a document
* Open a document and print a 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 Word
  + Basic Elements
  + Tabs & Groups
  + Saving Documents
  + Creating & Opening Documents
  + Printing Documents

**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 **Home**, **Insert**, **Page** **Layout**, **References**, **Mailings**, **Review** and **View**
  + **Groups:** The areas within Tabs where related task functions—like adjusting the Page Setup—are organized
* Accessing Word
  + Explain how to access Word 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 2013**
4. Click on **Word 2013**
5. Click on **Blank document** to create a new Word document

* If applicable, explain that at your library, users can access Word by clicking on a desktop icon located on the main screen

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

* Basics Elements
  + Open a new Word document and do a live demonstration of each of the following elementsas you explain them
    - **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 **Normal** view to **Read** **Layout**, **Print** **Layout**, or **Web** **Layout**; 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
* **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 #2** on the *Activity Sheet*

* Tabs & Groups
* Explain that Word contains eight 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)
  + **Editing** (find and replace text, 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)
  + **Links** (insert a hyperlink, bookmark, or cross reference)
  + **Header & Footer** (insert page numbers and a header or footer)
  + **Text** (add a text box, word art, date and time stamp, etc.)
  + **Symbols** (add symbols or equations)
* **Design** containsthese Groups related to the visual presentation of a document:
  + **Themes** (add a color/font theme)
  + **Document Formatting** (insert a specific layout/font theme)
  + **Page Background** (add a watermark, colored background, or a border)
* **Page Layout** contains these Groups related to the arrangement and spacing of items:
  + **Page** **Setup** (adjust margins, orientation, document size, hyphenation, etc.)
  + **Paragraph** (adjust indentations and spacing)
  + **Arrange** (position images, adjust layers, align and wrap text)
* **References** contains these Groups related to writing papers and reports:
  + **Table of Contents** (create a table of contents)
  + **Footnotes** (add footnotes or endnotes)
  + **Citations & Bibliography** (create in-text citations and bibliographies)
  + **Captions** (add captions to graphics and images)
  + **Index** (add an index)
  + **Table of Authorities** (add a list of cases, statutes, and other authorities)
* **Mailings** contains these Groups related to creating mailing lists:
  + **Create** (document type- envelopes or labels)
  + **Start Mail Merge** (create a form letter and select recipients to send it to)
  + **Write & Insert Fields** (create a greeting, add address, and insert fields)
  + **Preview Results** (see what your document(s) will look like and check for errors)
  + **Finish** (generate the mailing list or form letters)
* **Review** contains these Groups related to editing and versioning documents:
  + **Proofing** (check spelling, grammar, word count, or use the thesaurus)
  + **Language** (translate the document into another language)
  + **Comments** (add or view comments)
  + **Tracking** (keep track of changes made to the document and select how changes are displayed)
  + **Changes** (accept or reject proposed changes to the document)
  + **Compare** (compare two versions of the document or view comments from multiple editors in one document)
  + **Protect** (restrict editing or block authors)
* **View** contains these Groups related to how documents are viewed:
  + **Document Views** (select how the document appears on the screen)
  + **Show** (display ruler, gridlines [for aligning objects], and navigation pane)
  + **Zoom** (increase or decrease the size of the document in the window, view one or more pages, or adjust the page width)
  + **Window** (open a second window, split a window, or stack windows so you can see different parts of your document at the same time)
  + **Macros** (a way of creating a shortcut to a frequently-performed task, such as adjusting bullet point margins)
* **File** contains these commands related to what users do with a document once it’s created:
  + **Info** (protect a document, see version information, inspect the document, and view a document’s properties)
  + **New** (create a new document)
  + **Open** (open an existing document)
  + **Save** (save a document to its currently-save location)
  + **Save As** (save a document to a new location)
  + **Print** (print a document)
  + **Share** (email, upload a document to OneDrive, post it to a blog, or add it to a presentation)
  + **Export** (create a PDF or change the document type)
  + **Close** (close a document)
  + **Account** (modify account information, change background theme, see product info)
  + **Options** (adjust display, language, general and other options for documents)

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

* Saving Documents
* Explain to participants that the first time they save a document in Word 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 #4** on the *Activity Sheet*

* Creating & Opening Documents
* Show the steps for creating a new document as you explain them:

1. Click on the **File** tab
2. Click on **New**
3. Click on the type of document you want to create (e.g. Blank, Template, etc.)

* Share 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

* Also share that Word 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 #5** on the *Activity Sheet*

* Printing Documents
* Finally, demonstrate how to print a document while you outline the following steps:

1. Click on the **File tab**
2. Click the **Print** option
3. Select the appropriate printer (the default should be selected)
4. Adjust any settings or properties in the **Settings** area (such as the number of copies, stapling options, two-sided printing, etc.)
5. Click the **Print** button

**ACTIVITY:** Have participants complete **Activity #6** on the *Activity Sheet*

**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