Design Document: File Management Basics

Class Description

Learn how to find electronic files quickly and easily by creating folders, organizing files into folders, and managing content in this class.

**Curriculum Track**

Basics

**Audience**

Adults who have some experience with computers

**Course Length**

90 minutes

**Training Method**

Instructor-led hands-on

**Purpose**

The purpose of this session is to help participants feel comfortable and confident managing files

Equipment Requirements

Projection screen, laptop with internet connection, laser pointer (recommended)

Software Requirements

Windows 7 (This version explains navigating with Windows 7 version of File Explorer).

Material Requirements

Pens or pencils, Activity Sheet, Handout, participant surveys

**Learning Objectives**

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

* Understand what a file is and explain related terminology
* Navigate File Explorer to locate files
* Create new files and manipulate existing files by
  + Copying
  + Moving
  + Renaming
  + Deleting
* Create a new folder and manipulate existing folders by
  + Moving
  + Renaming
  + Deleting

**Assessment Technique(s)**

Successful completion of activities

Content Outline

**Agenda (3 mins)**

* Outline the following topics that will be covered in class:
  + Terminology & Descriptions
  + Navigating File Explorer
  + File Types
  + Creating and Manipulating Files
  + Creating and Manipulating Folders

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

* Terminology & Descriptions
  + Define the following terms for participants before you begin demonstrating them:
    1. **File** – An object on a computer that stores data, information, settings, or commands
    2. **Folder** – A place where files can be stored in groups to stay organized
    3. **Sub-folder** – A folder created within another folder
    4. **File Explorer** – Windows app that allows you to look at all the files and folders on your hard drive and other storage devices
    5. **Drive** – A place where you can store files and folders. It is usually a hard drive.
    6. **Flash Drive** –A portable device that allows you to store and easily move around files.
* Navigating File Explorer
* Demonstrate how to access and navigate **File Explorer** – The place where their files are stored
  1. Open File Explorer by clicking on the folder icon on the Toolbar
  2. In the **Navigation pane**, point out the following items and demonstrate accessing them:
     + ***Favorites***
       - **Desktop** – The primary display area on a computer screen where you can add short-cuts and frequently accessed files.
       - **Downloads** – Ideal for downloaded material. Often, things downloaded from the Internet will automatically be saved to this folder. They can be moved later.
       - **Recent Places** – If you’ve visited other folders recently, they will appear the in the File Explorer window when you click on this.
     + ***Libraries*** – Pre-created labeled folders for easy organization. Windows 7 called this collection of folders “libraries.” You can use these folders as is or create new or sub-folders to supplement these.
       - **Documents** – Ideal for all kinds of text documents
       - **Music** – Ideal for all your music files
       - **Pictures** – Ideal for all your image files
       - **Videos** – Ideal for all your video files
     + ***Computer***
       - **Local Disk C: drive** - This is your computer’s hard drive and contains folders and files vital to running your computer. You should not have to access this normally.
       - **Possibly Additional drives** – Flash drives, DVD/CR-ROM drives, etc. will all appear here when connected. They will display different letters (ex: E: drive, D: drive)
* Search Box
  + Despite having folders, sometimes files get misplaced. Instead of accessing each folder to search for the file, use the search box to locate the file.
    - Using the Navigation pane, select a place to search. For example, *C: drive* or *Libraries*
    - Type part or all of a file name into the **Search** box. If you can’t recall the name, try one of the other filters available (**Date** or **File** **Type**)
    - Search results will begin appearing in the window. The location of the file will appear under the file name, so you will know where to find it. This is known as a **File Path** and will appear in the **Address Bar** at the top of the File Explorer window.
* Changing Icon Views & Previewing Files in File Explorer
  1. Access a folder with multiple files in it (ex: Sample Pictures folder)
  2. On the top right click on the down arrow next to the **View** button
  3. Select each different view option to demonstrate how the icons change
  4. Show how turning on the **Preview Pane** can work in conjunction with certain views. Turn the Preview pane off again by clicking on it.
  5. Select **List View** and show all of the details such as time, file type, and size
* File Types
* Explain that there are a variety of file types, each with its own dedicated meaning and designed to work in certain programs. Files must have two things: A **File** **Name** and an **Extension** (the “.something” that indicates what type of file it is). File types are also represented by a specific icon so that they are easy to determine.
* Go over the popular file types and extensions that are listed on the handout. If possible, show an example of each file on the computer show that participants can become familiar with the icons and extensions:
  + .doc, .docx, rtf = Word Document
  + .ppt, .pptx = PowerPoint Presentation
  + .xls, .xlsx = Excel Spreadsheet
  + .html = HTML Internet file (if someone were to save a specific webpage as a file)
  + .txt = Plain Text file, such as one created in Notepad
  + .JPG, .PNG, .GIF, .bmp = Picture files
  + .mp3, .mp4, .wav = Music files
  + .pdf = PDF (Portable Document Format) – Common format for official docs and forms

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

* Creating and Manipulating Files
  + Creating New Files
    - Some files are created when you open a program. Other files are created when you move them one device to another (ex: moving picture from a smartphone to a computer)
    - For this class, we will focus on the creation of files from programs, such documents created in Microsoft Word.
      * Demonstrate how to open a new, blank file in Microsoft Word. Type a sample sentence, such as “I love learning” at the library”. Explain that it is important to Save your file early and often, especially if you are making a lot of changes
    - Save vs. Save As
      * In your sample Word document, click **File.** Point out that there are two different options for saving a file
      * Explain that the first time you save a document, you must select **Save As.** When selected this provides a pop-up window for you to:
        1. Select the location of where you want to save the file
        2. Name the File (simply type over the blue, highlighted text)
        3. Select the File type (if more than one option is applicable)
      * As an example, save your document as File Management.docx to the Desktop
      * Make some modifications to the text, such as changing the font style, size and color. Explain that if you want to keep any changes you’ve made, you can now go to **File** then select **Save**. You can also **Save** by clicking the floppy disk icon in the toolbar (this icon is the universal symbol for Save an found in many programs)

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

* + Copying and Renaming
    - Explain that you may need to make a copy of a file. This is helpful if you need to save an original and then make multiple versions with modifications.
      1. Close your Word document
      2. Demonstrate how to copy your Word file by right-clicking and selecting **Copy**
      3. Right-click on your desktop and select **Paste**
      4. Note that the new file is titled “File Management - Copy”
      5. Right-click on the file and select **Rename**.
      6. Name the file “Library Training”
  + Moving
    - Explain that you may need to move files to a different location from time to time
      1. Right-click on your “Library Training” file and select **Cut**
      2. Open File Explorer and access your Documents folder
      3. Right-click and select **Paste**. Note that this file has now moved from the Desktop to your Documents folder.
  + Deleting
    - Explain that from time to time, you will need to delete files
      1. Remind participants that you have made a copy of your original file, “File Management”
      2. Right-click on your “Library Training” file and select **Delete**
      3. Remind participants that this was a duplicate copy and you still have the original file, “File Management” on the Desktop

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

* Creating and Manipulating Folders
  + Creating New folders
    - Explain that in order to keep files organized, it may be useful to create more folders than what Windows initially provides, as previously discussed
    - Demonstrate how to create a new folder by right-clicking on the Desktop, moving the cursor over New and selecting Folder
    - Make sure to name the folder something recognizable
  + Copying
    - Explain that copying a folder can be useful when you want to duplicate many items at a time, such as when you’re importing/exporting from a computer to a flash-drive
    - Explain that coping a folder works the same way as copying a file
    - Demonstrate how to copy a folder by right-clicking and selecting **Copy**, then **Paste**
  + Moving
    - Explain that moving a folder works the same way as moving a file
    - Demonstrate how to move a folder by right-clicking and selecting **Cut**, then **Paste**
  + Renaming
    - Explain that renaming a folder works the same way as renaming a file
    - Demonstrate how to rename a folder by right-clicking on the folder and selecting **rename**
  + Deleting
    - Explain that deleting a folder works the same way as deleting a file
    - Demonstrate how to delete a folder by right-clicking on the folder and selecting **delete**

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

* Using Flash Drives (If time permits)
  + Note: this part of the class will be demo only unless time allows for hands-on and there are enough flash drives for each student to have one
  + Define **Flash Drive** as a portable storage that allows you to save, move, and back up files
  + Demonstrate how to copy files to and from a flash drive

1. Plug in a flash drive to your computer
2. When **AutoPlay** shows up choose **Open folder to view files using Windows Explorer**
3. Show the students the different files that are on the flash drive
4. On the **Navigation Bar** show that the flash drive appears as a new letter drive (E, F, etc.)
5. In the **Navigation Bar** choose **Computer**
6. Show the class where the removable drive is under Computer
7. Finally show how they can tell the amount of space filled and how much space the drive has

* Wrap Up/Closing
  + Review activities & Point out reference on last page
  + Answer questions from participants
  + Thank participants for coming and ask them to complete the class survey before leaving