Design Document: Google Sheets

Class Description

Learn how to create and manage spreadsheet data using the basic features of Google Sheets.

**Prerequisites**: Must have a Google account.

**Curriculum Track**

Software & Apps

**Audience**

Adult learners

**Course Length**

90 minutes

**Training Method**

Instructor-led training with hands-on activities

**Purpose**

To promote the benefits of using Google Sheets for managing spreadsheet data and collaborating with others.

Equipment Requirements

Projector and projection screen; computers with internet access for the instructor and each participant; laser pointer (recommended)

Software Requirements

Windows 7, Google Chrome, and a Google Account

Material Requirements

Pens or pencils, PowerPoint presentation, activity sheet, handout, participant surveys

**Learning Objectives**

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

* Explain how to create a new document with Google Sheets
* Demonstrate an understanding of how to rename, copy, and download a spreadsheet
* Describe common methods of editing and formatting spreadsheets
* Explain how to locate spreadsheet functions and formulas
* Describe how to share a document with others

**Assessment Technique(s)**

Successful completion of class activities

Content Outline

***Agenda (3 mins.)***

* Getting Started with Google Sheets
* Creating and Working with Sheets
* Working with Cells and Sheets
* Working with Formulas and Functions
* Sharing and Collaborating
* Wrap-up / Closing

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

* **Getting Started with Google Sheets**
  + Provide a high level introduction to Google Sheets
    - Explain that Sheets is a web-based spreadsheet application which allows real-time collaboration with others.
    - Sheets is cloud based, so all files are saved and accessed in the cloud (Google Drive)
    - Google Sheets can be converted to Microsoft Excel format, and vise versa
    - Each prior revision of a Google Sheet can be accessed and restored
  + Accessing Google Sheets
    - Advise participants to open Google Chrome form their desktop and access sheets.google.com

**ACTIVITY:** Ask participants to complete **Activity 1** on their *Activity Sheet*

* + Navigating Google Sheets
    - Describe the main sections of the Google Sheets home screen
      * ***Your Docs*** – Documents which belong to the user
      * ***Templates / New Doc*** – Starting place for creating a new document
      * ***Search bar*** – A search tool used for locating the user’s documents
      * ***File picker*** – An alternate way of accessing the user’s files; can access documents created in other Google applications (Ex: Sheets)
      * ***Display options*** – Sorting and display options
* **Creating and Working with Sheets**
  + Introduction to creating and working with spreadsheets
    - Provide an overview of the way in which Google Sheets makes it easy to create new documents and make basic changes.
    - Explain that quick, easy changes which will be discussed include renaming a spreadsheet, adding data, copying a Sheet, downloading from Drive, and using templates
  + Using Google Sheets Templates
    - Explain that a variety of templates are available to create new docs for a variety of purposes
    - Templates can be used to create budgets, calendar, schedule, to-do list, and more
  + Creating a Sheet from a Template
    - Provide an overview of how to create a new spreadsheet using a template
    - Creating a spreadsheet from a template is done by accessing the Google Sheets home screen and clicking on the desired template
    - Demonstrate how to create a new document using the “To-do list” template
      1. Access the Sheets home screen
      2. Locate and click on the “To-do list” template
      3. Summarize the instructions listed in the spreadsheet
      4. Add a new task into cell C7 (i.e. pay cable bill)
      5. Exit the document by clicking the Sheets home screen button
      6. Highlight the availability of the saved “To-do list” in the user’s documents (from the Sheets home screen)
  + Renaming a Sheet
    - Explain that new Sheets are entitled “Untitled Document” until they are renamed
    - Describe how a document title can be changed – by clicking in the “Document Name” field and typing a new name
    - DEMONSTRATION: Access the “To-do list” created previously and rename it “Training Class Tracker”

**ACTIVITY:** Ask participants to complete **Activity 2** on their *Activity Sheet*

* + Viewing Revision History
    - Describe the purpose of Revision History within Google Sheets:
      * …to display a listing of call changes that have occurred throughout the document’s lifecycle
      * …to allow user to revert to any prior version
    - Demonstrate the steps for accessing Revision History – Select *File > See revision history*
  + Reverting to Prior Versions
    - Describe the information which displays in revision history
      * All prior versions of the document are displayed, including date and time each version was modified
      * The “Preview Window” shows what the selected version looks like
      * Reverting to a prior version is accomplished by selecting a prior revision and clicking the corresponding option to “Restore this revision”
  + Making a Copy of a Sheet
    - Explain that a duplicate copy of a spreadsheet can be easily created
    - Duplicating a spreadsheet is accomplished by selecting “File” from the menu options and clicking “Make a copy”
  + Downloading a Document
    - Explain that spreadsheets created in Google Sheets can be saved and converted to another file type on your PC
    - Downloading a document is accomplished by selecting ***File > Download as*** and then selecting a file type (Ex: Microsoft Excel or PDF)
  + Deleting a Sheet
    - Explain that a spreadsheet can be deleted from cloud storage if it’s no longer needed.
    - Demonstrate how to delete a sheet by selecting *File > Move to trash*
  + Creating a New Sheet
    - Demonstrate the method of creating a new spreadsheet by clicking the “Blank” new document button from the Sheets home screen
    - Highlight the fact that new spreadsheets (and all subsequent changes) are automatically saved in real time

**ACTIVITY:** Ask participants to complete **Activity 3** on their *Activity Sheet*

* **Working with Cells and Sheets**
  + Provide an introduction to working with cells and sheets
    - Explain that spreadsheets can be modified with data and text, formatting options, and more.
    - Additional options included adding or deleting columns, rows, and new sheets (tabs)
  + Entering data into a cell
    - Explain that clicking on a cell allows the user to begin typing text or other data
    - Describe the two primary methods of editing text that’s already in a cell.
      * Overwriting – Click once on the cell and enter new data
      * Modifying – double-click on the cell and edit the text
  + Changing number formatting
    - Describe the various types of formatting options available for numerical data and refer to the slide presentation for an example of each
      * ***Number*** – Plain text
      * ***Percent*** – Display numbers as a percentile
      * ***Currency*** – Display numerical data as a dollar amount
      * ***Date*** – Ex: 12/12/2016
      * ***Time*** – Ex: 10:12:00 PM
    - Outline the steps taken to modify number formatting (select *Format > Number* from the menu bar)
  + Changing text formatting
    - Describe available text formatting options including bold, italics, underline, colors, and font types.
    - Demonstrate how to modify font within a document by selecting a cell and clicking though various formatting options.

**ACTIVITY:** Ask participants to complete **Activity 4** on their *Activity Sheet*

* + Modifying cell formatting
    - Describe the available formatting options for a cell:
      * ***Text alignment:*** Align text to the right, left, or centered
      * ***Fill Color:*** Color sharing within the cell
      * ***Borders:*** Add a border around an individual cell or group of cells
      * ***Text wrapping:***  Select how text should display when the cell is not large enough to display all the text.
  + Inserting a new sheet (tab)
    - Explain that a new sheet (known as “worksheet” in Excel) can be added by clicking the plus sign in the lower-left corner
    - Demonstrate how to add a new sheet
  + Modifying a sheet
    - Explain that each sheet (tab) can be modified with a different name, color, and more
    - Demonstrate how to access modification options by right-clicking a sheet
* **Working with Formulas and Functions**
  + Introduction to formulas and functions
    - Explain that Sheets provides the ability to perform calculations using functions and formulas similar to what’s available in Excel and other spreadsheet software
    - A list of all available functions is available online
  + Using the SUM function
    - Describe the purpose of the SUM function – to calculate the total sum of numbers within a range of cells
    - Demonstrate how to use the SUM function by typing into the function into a new cell and selecting a range of number (Ex: Type =SUM(*cell range*))
  + Accessing other functions within Sheets
    - Within the slide presentation, highlight the menu path which can be selected to a view an online list of all available functions
    - Click the functions button on the toolbar and select “More functions…)

**ACTIVITY:** Ask participants to complete **Activity 5** on their *Activity Sheet*

* **Sharing and Collaborating**
  + Introduction to sharing and collaborating
    - Explain that Google Sheets provides the ability to share a document with others and select their level of access (edit, view only, etc.)
    - Describe scenarios in which a document might be shared – to collaborate on it with colleagues, to send a file to a friend or client
    - Explain that files can be shared with both Google and non-Google users
  + Sharing a Document
    - Provide an overview of how to share a Sheet w/ another person and describe each level of permission which can be assigned (Edit, View, Comment)
    - Sharing a spreadsheet is accomplished by:
      1. Click “Share” button
      2. Select recipient(s), permissions, and type an optional message
      3. Click “Send” button
  + Viewing Email Notifications for a Shared Spreadsheet
    - Using the slide presentation, show what an email looks like that is sent to collaborators when a document is shared with them
    - Mention that non-Google users will have “View only” access to Google documents; they cannot make edits or add comments

**ACTIVITY:** Ask participants to complete **Activity 6** on their *Activity Sheet*

* + Adding “Comments” inside a Sheet
    - Explain that comments can be added by selecting a cell or group of cells and then clicking the Comment button
    - Comments are useful for making a note to yourself about the data in a cell or asking a question to another collaborator

***Wrap Up/Closing (2 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
* Share that participants can find more info at GCF Learn Free ([www.gcflearnfree.org](http://www.gcflearnfree.org)) or Google’s online Help Center (<https://support.google.com>)
* Thank participants for coming and ask them to complete the class survey before leaving