

# Helping your learner understand documents, presentations and spreadsheets

Using documents can be a great way for your learner to organise their thoughts and ideas and present them nicely.

If they have never had to use documents before, for work for example, you can use this factsheet to introduce your learner to the basics of documents, explaining what the main types are, what they do, and how they can get the most out of them.

\*Instructions may vary according to your device model.

## What you'll cover

1. The main types of documents
2. How to create your own documents
3. How and why you should save your work

**Remember:** This is about helping your learner build their confidence and skills. Encourage them to carry out each step themselves and avoid doing it for them. If they do get stuck, feel free to show them, but then ask them to repeat it on their own.

## The main types of documents

In much the same way you can write a document using a pen and paper, you can make a digital document using a computer. This makes it easier to edit/change parts of it, and harder to lose it. It can also be sent to people via email, making it quick and easy for others to see your learner's handiwork. Digital documents can also be easier to create for people with motor impairments who may find writing by hand tricky, and they could even use their voice to create documents. Similarly, people with visual impairments can increase font sizes and change colours to make reading documents easier.

As well as putting words onto a page, there are programs to create all sorts of documents, such as spreadsheets, presentations and more. For your learner to create their own, they will typically need a package of productivity software (this is just a fancy phrase for a group of apps that will allow you to do things).

There are many different packages available, but two of the most popular ones are Microsoft 365 and Google Docs Editors. Both of these can be used free of charge through an internet browser. The packages will require your learner to create an account/sign in using their email address, they may also need your learner to provide their phone number. Once they do, they will be able to choose the programs they want to use. For more information on setting up an email address, your learner can click on the following link to access our email factsheet or, if this sheet has been printed, by typing the link into their web browser: [bt.com/seniorskills](https://bt.com/seniorskills)

To get started, your learner can visit one of the following links:

Microsoft: <https://www.microsoft.com/en-us/microsoft-365>

Google Docs: <https://myaccount.google.com>

If this sheet is printed, your learner can type these addresses into their web browser.

Helping your learner understand documents, presentations and spreadsheets *continued*

## Key programs:

Google Docs or Word



This will let your learner put words onto a page. This is best for creating CVs or posters.

Google Sheets or Excel



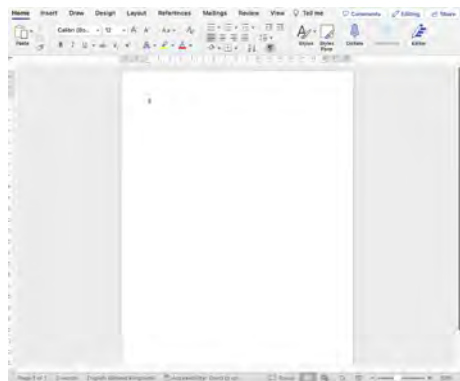
This will let them make their own spreadsheet, which can be great for things such as making a personal budget.

Google Slides or PowerPoint



This allows them to make an eye-catching presentation.

The best place for your learner to start will be with Google Docs/Word.



## Key symbols

When your learner creates a new document, whether using Google or Microsoft, they will be greeted by a lot of unfamiliar symbols. While the exact symbol will vary depending on the program and package, these are the key ones your learner will need to learn.



**Save** – Allows your learner to have a permanent copy of their document that they can use in the future



**Undo** – allows them to reverse the last change they made



**Redo** – If they accidentally undid something, pressing this will allow them to redo that last action



**Print** – print a physical copy of the document (if your learner's device is connected to a printer)



**Spellcheck** – allows your learner to check the grammar and spelling of their document so they can remove any mistakes



**100%** – alters the zoom on the screen (a higher number will zoom in further)



**Arial** – This will change the font of the text



**11** – allows them to change how big or small the text is



**B** – makes the text **bold**



**I** – Makes the text appear in *italics*

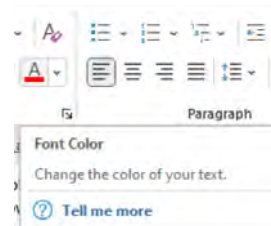


**U** – underlines the text



**A** – changes the colour of the text

If your learner forgets any of these, they can simply hover the cursor over the icon and a short description will appear.



The best way to get your learner familiar with these symbols is to practise. Ask them to write a short message in a document, using different fonts, sizes and colours.

## Saving your work


Saving documents means your learner can use them again in the future and that they don't have to start from the beginning. It's a good habit to save documents regularly as this will stop you from losing any work if something goes wrong.

Microsoft 365 and Google Docs save your learner's work automatically if they are connected to the internet. For other programs, however, they may need to save their work manually. This can be done by pressing the save button which is usually found in the top left of the screen when you have the program open, or under 'file' – again, this can be found in the top-left of the screen when the document/program is open.

## Helping your learner understand documents, presentations and spreadsheets continued

### Sharing your documents

Google and Microsoft online documents are easy for your learner to share.

1. Whether using Google or Microsoft, your learner can simply press the share button  **Share** in the top right-hand corner.
2. If they are using Google, they may be asked to name their document if they haven't done so already.
3. A screen will pop-up – at the bottom of the pop-up, make sure your learner has 'Anyone with the link' and 'view' are selected from the drop-down menu.
4. Have them click on 'copy'.
5. A link to the document will then be added to your clipboard and they are able to paste this into an email, for example, to share with someone else.

Alternatively, your learner can download the document (by clicking File – Download or File – Save As) and attach the document to an email. For more information on how to do this your learner can click on the following link to access our email factsheet or, if this sheet has been printed, by typing the link into their web browser: [bt.com/seniorskills](https://bt.com/seniorskills)



### Links to further learning

If your learner needs more advice for using Google Docs or Microsoft Office, all the programs have a 'Help' button at the top of the screen.

For more advice on how they can get the most out of their devices, they can check out our other factsheets by clicking this link, or typing it into their web browser: [bt.com/seniorskills](https://bt.com/seniorskills)

# Understanding documents, presentations and spreadsheets

Using documents can be a great way to organise your thoughts and ideas, present them nicely and share them with others.

This factsheet will introduce you to the basics of digital documents, explaining what the main types are, what they do, and how you can get the most out of them.

\*Instructions may vary according to your device model.

## What you'll learn

1. The main types of documents
2. How to create your own documents
3. How and why you should save your work

## The main types of documents

In much the same way you can write a document using a pen and paper, you can make a digital document by using your computer. This makes it easier to edit/change parts of it, and harder to lose. You can also send it to people via email, making it quick and easy for others to see your handiwork.

As well as putting words onto a page, there are programs that will let you create all sorts of documents, such as spreadsheets, presentations and more. To create your own, you will typically need a package of productivity software. This is just a fancy phrase for a group of apps that will allow you to do things.

There are many different packages, but two of the most popular ones are Microsoft 365 and Google Docs Editors. Both of these can be used free of charge through your internet browser. You will need to create an account/sign in using your email address (you may also need to provide your phone number). Once you do, you will be able to choose the program you want to use.

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## Understanding documents, presentations and spreadsheets *continued*

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Google Sheets or Excel



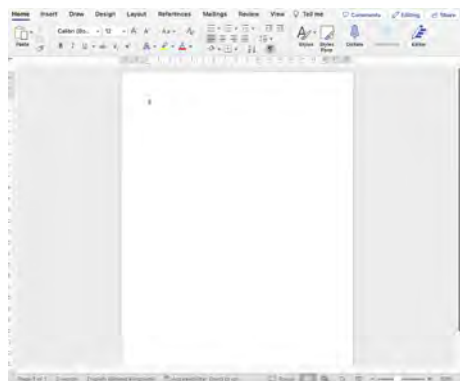
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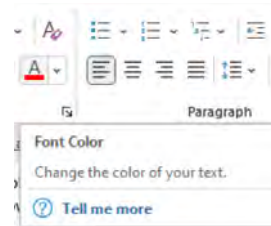


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