



Facilitator Guide

Digital documents



Key information

Overview

This lesson on Digital documents forms part of the EDS (Essential Digital Skills) training programme. The overall aim of the programme is to give people a practical understanding of the essential digital skills that will help them in their day-to-day lives. This lesson may be delivered as a one-off session or as part of the whole programme. If all lessons are to be run as a whole programme, this should be the fifth lesson (lesson 5). The aim of this session is to introduce learners to files and documents.

Duration

60 minutes

Resources you will need

- 1 PowerPoint session deck EDS Lesson 5 Digital Documents
- Access to a screen or device to share slide content with the learners (not required for one-to-one learning)
- Optional: Your personal device or an additional device

Resources the learner may need

- Paper/notebooks pens
- A device of their choice
- Wi-Fi access is helpful to share resources and use the links that are included in the session. If Wi-Fi is available, make this information (i.e., network name and password) available / visible to the learners, at the start of the lesson



This lesson will help your learners to:

- Name different types of files
- Download files from the web
- Find, create, and use files from their device
- Keep their files safe

Lesson plan

This lesson plan gives an overview of the content, approach and estimated timings for the lesson. The PowerPoint deck reflects the content included here. These notes are here to help you prepare for the session with extra detail and help to go alongside the PowerPoint deck.

In both the PowerPoint deck and the facilitator guide italics for a suggested script. This script is there to help you. You can adjust it to what feels comfortable for you. The rest of the guidance below are notes and guidance for you as the presenter to help you support your learners.

Please note that the times listed alongside the content are estimates. You can change them to work for your learners and the length of the session. If you have a learner who already knows or can do a step or activity, you could suggest they help other learners.

Topic	Suggested format	Script / trainer notes	Slides and resources	Time
Holding slide	While you're waiting for people to come into the session and settle, we suggest having this slide on screen	 TRAINER NOTE: Check what Wi-Fi network is available, its name and any password required; write up / make available to the learners Have this site up before running the session (as an example of how to download a document from the web):	Digital documents	n/a

		 Make sure everyone is comfortable Go to the next slide when you're ready to start the lesson 		
Welcome	This slide will be the start of the lesson once everyone is settled and everything is set up	TRAINER NOTES: • If this lesson marks the start of a programme, welcome people to the programme • If it is not, then welcome people to the lesson • Welcome to today's lesson on using digital documents • My name is _ and I'm here to help you today • We're excited to be here with you as you start to explore digital documents • We want to make this learning experience practical, relatable, and, most importantly, helpful to you • In the room (or virtually) we also have [Any Co-Presenter's Name] who is here to help you during this session TRAINER NOTE: For small groups / virtual sessions, learners could introduce themselves at this point. • So, in today's session, we'll explore what the documents and files are, and how to use them • You'll also find out how to keep them safe, wherever they are	Welcome	3 mins

		 If you have your device with you, we'll help you through the steps as you go If you don't have a device with you today, you can still learn what you can do when you use it next. As we go through today's lesson, please do ask questions, and let us know if you need anything. If we can't help today, we'll make sure you get the help you need after the session Let us know if we're going too quickly, too slowly, or if you need a break. We want you to get the most out of today, so I'll be guided by you 		
Today we want to help you:	This slide will be used to explain what they will learn today	 So, here's what we'd like you to get out of today. We want to help you: Name different types of files Download files from the web Find, create, and use files from your device Keep your files safe Every device is slightly different. Today we'll share general steps, tips and what to look for If you want more help doing any of the steps on your device as we go through, just let us know and we'll give you a hand And if you need more help with your type of device, we'll share some useful resources at the end of the session 	Today we want to help you: Name different types of files Download files from the web Find, create and use files from your device Keep your files safe	2 mins

What's up, Doc? And other files	This slide briefly introduces learners to what files and documents are, and outlines some the common types they'll likely come across, setting the stage for the next section	 Let's start with something familiar. Has anyone taken a photo on their phone? Listened to music? Watched a video? These are all different types of files You see, files are like containers that hold information. They can have text, pictures, sounds, or even things that make your devices work You might have created files before without even knowing it. Have you ever typed a letter on a computer or made a CV for a job? That's creating files too! Now, we use the words 'file' or 'document' to describe these things, whether they are pictures, text, or other stuff 	What's up, Doc? And other files - Documents - Spreadsheets - Presentations - Pictures - Audio files - Videos	4 mins
Documents	This slide introduces learners to text files/ documents – what they are, and the software used to create and view them	TRAINER NOTE: Hold up your facilitator guide (if you have it to hand) and highlight it as an example of a text document that was created using a computer • When you look at a document on your device, it has a name to describe what it's about, then a dot, followed by something called a 'file extension'. This tells you what type of file it is. We'll show you a few examples over the course of this lesson. With documents that you download, it's likely to be 'pdf'. Other documents often end in '.doc' or '.docx'. You don't need to know or memorise these, but it can help in the early stages of knowing how to open your files and what you can do with them. So when we look at different text files, I'll let you know what these letters are for each type.	Documents Microsoft Word Google Docs Adobe PDFs	4 mins

TRAINER NOTE – If appropriate, show an example on a device (e.g. in File Explorer from your laptop) or by writing up an example on a whiteboard / flipchart – can add to this as you talk through the different document file types

- Word documents are a common format for text documents [created in Microsoft Word] and usually have the file extensions '.doc' or '.docx'. It's what people use for things like CVs, letters, reports or essays
- You might also come across .txt: which is a plain text file. This means it contains only plain text no fancy formatting here. It's used for simple notes and can be opened by basic text tools
- Text documents can also be made in (Google) Docs, which is Google's equivalent of Microsoft Word – and is free to use – you just need a Google account. There are two file types they use that you might see - .odt (Open Document Text) and .rtf (Rich Text Format)
- Then there is Adobe's .pdf: PDFs are often used for sharing documents that should look the same on any device. You can open it using programs like Adobe Reader or from your web browser. People often create PDFs when they want others to be able to see but not change the content
- If someone sends you one of these documents, or if you see one online and want to access it, you may need to get the software to do this Microsoft Word, Google Docs or Adobe for pdfs. But often you can see these documents even if you can't make any changes

Spreadsheet	This slide introduces learners to spreadsheets – what they are, and the software used to create and view them	to them – without this. Check out the free mobile apps for Word, and the 'Google Viewer' option. • ASK: Does anyone know what a spreadsheet is? • A spreadsheet is just like a digital table or grid, as a different way of presenting information. It's a handy tool for organising and working with numbers and data. You might have seen spreadsheets in everyday life, without even knowing it. For example, think of bus or train timetables – those are like spreadsheets, helping you find the right information quickly and easily. Or, when you're planning your monthly budget, you're actually creating a simple kind of spreadsheet to keep track of your finances • Now, on a computer, we use special software to make and view spreadsheets. The most popular one is Microsoft Excel • When you work with spreadsheets in Excel, the files have the extensions '.XLS' or '.XLSX' • There's also Google Sheets, which is like Google's version of Excel • You can use both these tools from your web browser or an app	Spreadsheets Microsoft Excel Google Sheets	2 mins
Presentation s	This slide introduces learners to presentations – what they are, and the	 What I'm doing, right now, is showing you a presentation It's like a digital set of slides – think of each screen you see as a 'slide' The whole thing is often called a 'slide deck' or 'slide pack' 	Presentations Microsoft PowerPoint Google Slides Prezi	2 mins

	software used to create and view them	 Presentations are good for sharing information in a visual way, whether it's on a screen like this or shared for others to look at. They're often used in training sessions, at trade shows and conferences – anywhere you have a bunch of people you want to share info with in an interesting and engaging way. You can pop text, photos or other images, and video into your slides and you can arrange them pretty much any way you like. There's also a range of templates and backgrounds to give a professional or distinctive look to your presentation. The app most commonly used to create and open presentations is Microsoft PowerPoint When you work with presentations in PowerPoint, the files usually have the extensions '.PPT' or '.PPTX' Presentations can also be made in Slides, which is Google's equivalent of Microsoft PowerPoint There's also another option called Prezi, which is a bit different – it's web-based, and rather than have a 'next slide please' sequence, you can hop about more with this one 		
Pictures	This slide introduces learners to picture files – what they are,	 Picture files (also known as image files) can be photos, artwork, or illustrations - anything from a cartoon drawing to a company's logo Images can be uploaded from a digital camera – or taken directly on your device if it has a camera 	Pictures Take photos, paint or draw Create with Paint, Photoshop or Canva View and edit in Photos, Picture viewer or Preview	2 mins

and the software used to view them	 They can capture moments, help explain ideas, and can make documents and presentations more visually engaging If you want to create artwork, there are lots of options for software that you can use to design, from Canva to Photoshop If you just want to look at them, pictures are mainly opened in 'Photos'. 'Picture viewer' or 'preview'
	TRAINER NOTE: Explain that this will vary depending on the device they are using
	 Picture files without any animation usually have the extension '.JPEG' or '.PNG' JPEG is a common image type that's often used for photographs and colourful images. It's the format your digital camera or smartphone will most likely use. JPEGs are good for sharing and displaying high-quality images on various devices, without taking up too much space PNGs are good for things like logos. They allow you to have blank (transparent) backgrounds
	 Then there are GIF (.GIF). Unlike JPEG and PNG images which don't move, GIFs are a special type of picture file that can include simple animations GIFs are moving pictures. They work by playing a series of images in a loop to create a short animation. They are commonly used in

		fun or show how we are feeling. For example, you might use a GIF of clapping hands to celebrate somebody's success, or a dancing GIF to show you are excited • So, when you come across images, you might encounter the static ones like JPEG and PNG, as well as the animated and playful ones like GIFs. These image files help us tell stories, share memories, and make things more engaging			
Audio	This slide introduces learners to audio files – what they are, and the software used to listen to them	 Audio files are like digital sound recordings. They can be anything from voice notes in WhatsApp, your favourite songs, or even podcasts When it comes to listening to audio or sound files, there are various ways to do it, and it can depend on the device you're using: You can open audio files on your computer using software like Windows Media Player (for Windows) or QuickTime Player (for Apple devices). Just double-click the audio file, and it should start playing If you're using a smartphone or tablet, you have even more options. You can listen to music through apps like Spotify, Apple Music, or Amazon Music. And for podcasts, you can use apps like Apple Podcasts or Google Podcasts. Just open the app, search for the music, or podcast you want, and press play. Many of these apps you 	sound effe Listen on V QuickTime	Windows Media Player or	2 mins

	 can use on your computer too – so long as it is connected to the internet So, whether you're into music, podcasts, or just want to listen to voice recordings, there are plenty of ways to enjoy audio files, both on your computer and your mobile devices 		
This slide introduces learners to video files – what they are, and the software used to watch to them	 Video files are like digital movies or shorter clips You can record videos with your camera or even record them directly on your device if it has a camera. You can also use certain apps to make changes to your videos When it comes to watching video files, there are different ways to do it, depending on the device you're using: You can watch video files on your computer using software like Windows Media Player (for Windows) or QuickTime Player (for Apple devices). To watch a video, just double-click the file, and it should start playing If you're using a smartphone or tablet, you can watch videos through apps like YouTube or streaming services like Netflix or Amazon Prime. Just open the app, search for the video you want to watch, and press play. You can access many of these apps on your computer or smart TV too – you just need a high-speed connection to the Internet So, whether you're into home videos of your pets or children, movies, or online content (like YouTube how-to guides), there are 	Videos Play on Windows Media Player or QuickTime Player Stream from YouTube, Netflix, Amazon Prime or Disney+ Create on TikTok, YouTube or iMovie	2 mins

		lots of ways to enjoy videos, both on your computer and your mobile devices			
Downloading files	This slide briefly explains what 'downloading' means and tips on how to do this	 When you download files from the internet, it's like storing a copy of that item on your device, just as you would save a recipe from the internet on a piece of paper for later use. It becomes stored on your device* – usually in the download area - for you to access whenever you want (*more on this in a moment) Keep an eye on the file size. Think of files like different-sized toys. Some are big, like large stuffed animals, while others are small, like little toys. The size of a file matters because larger files take more time to download, just like big toys take up more space in your room. If you have a slow internet connection, downloading big files can feel like waiting for a snail to cross the road, while it's a lot quicker to download smaller files It's a good idea to check the size of a file before downloading. If it's too big and you're in a hurry, you might want to find a smaller version. Things like photos, videos, and music files are often larger because they have lots of visual or audio content Remember, it's important to ask for permission before using things like pictures, texts, or videos from the internet that could belong to someone else – as is usually the case with most of the images you'll find on a Google Image Search. Just as you wouldn't take someone 	Downloading files	2 min	ins

	 else's stuff without asking, you should always respect other people's content online. Respecting other people's stuff is a big rule on the internet Does anyone have questions about downloading or dealing with file sizes? 		
Practical activity (the slide lists the steps involved) to find and download a file to their device	 TRAINER NOTE: PRACTICAL ACTIVITY-BASED LEARNING: Conduct a step-by-step from accessing content on a website to downloading that content onto their own device. We recommend using the following example: Apply for a Voter Authority Certificate by post if you're living in the UK - GOV.UK (www.gov.uk) Whilst conducting the step-by-step walkthrough, outline principles of safe downloading, including what to check and when they should take care around downloading content. Here's a step-by-step guide: Find the content Start by opening your web browser (or scan the QR code on the slide) Type in the web address (URL) of the website where you want to find content Once you're on the website, find the content you want to download. It's like finding the right book on a shelf 	Activity: Download a file 1. Find the content 2. Check the source 3. Start the download 4. Save to a safe pace 5. Enjoy the content	7 mins

2. Check the source

- Before you download anything, look for signs that show the content is from a trusted source. It's like checking if a food package has a 'best before' date
- Make sure you're on the official website. Don't download files from strange or suspicious websites, just like you'd avoid eating something if you didn't know what was in it

3. Start the download

- Click on the download link or button. It's usually clearly marked
- o You might see a 'Save' or 'Download' option. Click on that
- If the website asks for your email or personal information, ask yourself why they need this information. It's like a stranger asking for your address. Only share this information if you trust the website

4. Save to a safe place

- Most things you download from the internet get stored in the downloads area of your device. This is where the file will go unless you tell it to store it somewhere else
- If you want to choose where to store your file, save it in a folder you can easily find

5. Enjoy the content

o Once the file is downloaded, you can open and enjoy it

		 Remember, it's always a good idea to scan the downloaded file with an antivirus program if you have one – just to make sure it's safe And that's it! You've safely downloaded content from the internet. If you ever feel unsure, don't hesitate to ask someone you trust for help 		
Finding files	This slide explains different ways to find and search for files and documents on their device	 It's all well and good being able to download a file on to your device, but how do you find those saved files when you need them later? Once a file is saved on your device, there are several ways you can access it. You can: Look in your Files area Use your device's 'search' tool Open your files from inside the Program/app Let's put this into action now and see if you can find your downloaded file 	Finding files - Look in your Files area - Use the Search tool - Go to the app	2 mins
	Practical activity to give learners practice in finding their downloaded files	 TRAINER NOTE: Demonstrate how to find a file by finding the file that was downloaded earlier. Start by opening your file app (this will be named something like "Files" or "File Explorer" app on your device) You might see your file right away if it's the only one there. Open it up by tapping or double-clicking on it 	Activity: Find your file 1. Find and open 'Files' 2. Select your downloaded file OR 1. Find the Search tool 2. Enter the file name	4 mins

		 As you get more and more files on your device, finding a specific file might get tricky. If that happens, you can use the search feature Look for a magnifying glass or a search icon and click it. It's like the search bar on a website where you can type in what you're looking for Once you've found the search bar, type in the name of the file you're looking for. It's like telling the app exactly what you want to find Just like you'd press the "Search" button on a website, hit "Enter" or "Search" in the app, and it will find your file for you Now, imagine if you have lots of files, like photos, documents, and videos. To keep things tidy, you can create "folders" (think of them as digital boxes) to put your files in. For example, you can have a "Family Photos" folder where you keep all your family pictures, or a "Work" folder for work-related files. Folders help you find your files more easily 		
Activity: Create a document	This slide talks through the process of finding and using software to create a document. It acts as a stepby-step guide to finding, accessing, and using software	 TRAINER NOTE: If possible, the next two slides (this 'Create a document' and the 'Saving your document' slide that follows) should be run as an activity. The learners may skip the first two steps Okay, so we have covered how to search, find, and download a file, and where to find them on your device, but what if we want to create a document from scratch? If you have your device to hand, please feel free to follow along as we go The first step is to find the right software. In the same way that you need the right software to open a file, to create your document, you need the right type of app on your device. Most devices will have an 	Activity: Create a document 1. Find the right software Download the app 3. Open the app 4. Start a new document 5. Save your document 6. Add your content 7. Formatting	3 mins

		1	
to create a new document	app store where you can find programs that suit your needs. You can search for apps and click to 'download' them directly to your device		
.6 .11	Another way to download software is to search for them via your web		
If possible, run this as an	browser and search engine. So, if you're looking for software to help you draw on your tablet, for example, you could search for 'drawing		
activity	software'. If you know the name of the application you're looking for, you could then search for the name		
	Step 2 is to download the app. Once you have the app you need		
	downloaded, you should be able to find it from your device's menu		
	Step 3 is to open the app. Once you've found what you're looking for,		
	you can click/tap to open it, depending on the kind of device you're using		
	• Step 4 is to start a new document. Inside the app, look for a button that says 'New Document' or 'Create New'.		
	If you're looking to open a document that already exists on your device, you can click the 'Open' button		
	Step 5 is to save your document. After all, you don't want to lose the		
	work you've been doing. (Don't worry if you get stuck here, we'll show you how in the next slide. Just remember that you ought to be doing		
	this, at an early stage, when working with documents)		
	Step 6 is to add your content		
	Step 7 is formatting. You can format your text make text stand out, or		
	use different colours or styles to give a smart, creative, or professional look - whatever look you're after		
	Don't worry about finishing your document now. You can keep working		
	on it after today's lesson. In order for you do this, it's important you save your work		

This slide explains what it means to save and share your work whenever you create or make changes to your documents. Continuing from our previous slide, this is where the save your documents. Continuing from our previous slide, this is where the save your documents. Continuing from our previous slide, this is where the save your document step comes in There's a save icon that you can use to do this (TRAINER NOTE: point out what this looks like) Alternatively, go to the top left of the document and click 'File' and then 'Save sa', this will allow you to save your document to a place that you can easily find later and to save it with a 'file name' you can recognise It's a good idea to save your work once, you don't need to click 'save as' again, you can just click 'save' and it will save your work in the folder and with the name you have already set It's a good idea to save your work regularly. If you don't, you could risk losing what you're working on if there are any issues with your device or you lose power etc. No matter what type of document you want to make, the steps are quite similar It's really important to remember that saving your work is something you do before you start creating your content, and it's what you do while you are creating. It's not just something you do at the end of the day! Certain apps, such as Word online or Google Docs, save to the Cloud automatically (so long as you have a connection to the internet). If you lose connection, it will update when you get your connection back. This saves you having to remember and reduces the risk of you losing

Using folders	This slide covers folders and how these can be used to group files so they can easily be found	 Folders are like digital containers where you can keep your files organised, just like putting your work in a physical folder. They make it easier to find what you're looking for To create a folder, go to your files area. Look for the word 'add' or a '+' icon, then choose 'folder' or 'new folder' - this depends on your device. Think of it like getting a new box to put your things in Once you have a folder, you can start putting your files into it If you have lots of files, you can even have folders inside folders, just like dividers in a physical folder. For example, you can have a 'Work' folder and create subfolders for different projects Folders help you stay organised and save time. They prevent your device from becoming a mess of files and make it easy to find what you need 	Using folders **	3 mins
Sharing documents	This slide highlights the benefits of cloud and explains how to share documents using Cloud, attaching documents, sending an editable link etc.	 TRAINER NOTE: Be ready to demo the steps covered on this slide Want to share your photos, videos or documents? Here are a few ways to do it On your phone or touchscreen device, you might see the share icon – This is like a rounded square, with an arrow pointing up out of it (TRAINER NOTE: Draw this on board / flip chart if possible). You'll see this when you look at a particular file, photo, video or even when you're looking at a web page (to share a link to that page). Often this is the quickest and easiest way to share. When you tap on the icon, it will show you your options – a list of the apps you can use to share, like social sites, messaging apps or email Cloud storage, like Google Drive or Microsoft OneDrive, is another handy way to store and share your documents. You upload your document, and it becomes accessible from any device with 	Sharing documents The 'share' icon Sharing your cloud-based files Attach documents	4 mins

		 internet. To share it, you click on the 'Share' option, enter email addresses, and choose whether others can view, comment, or edit When sending an email, you can attach your document. Look for the 'Attach' or 'Paperclip' icon, select your file, and send it. Keep in mind that this sends a copy of the file, which is good for sharing finished versions Consider who you want to share with and what level of access you want to give them. Whether you prefer sharing through apps, using cloud storage or attaching documents to your emails, choose the option that works best for you 		
Today you've seen how to:	Reflect on the skills learners have gained during the session and invite questions and feedback	 Let's take a moment to reflect on what you've accomplished today. You should now be able to Name different types of files Download files from the web Find, create, and use files from your device Keep your files safe 	Today you've seen how to:	2 mins
Any questions?		TRAINER NOTE: Ask if they have any questions, comments or feedback that you can help with. You could consider this as an opportunity to check level of confidence in doing these in future, ask what they found most useful, anything they'd like to know more about (or to go through again before the lesson ends) and where they think they'll need more practice.	Any questions?	

Post-session survey	Self-assessment survey of learners' skills at the end of the session	TRAINER NOTE: Encourage learners to scan the QR code here and complete our short survey around levels of confidence in the session's topics today, plus what they would like to get out of the session.	Thank you! Tell us what you think	5 mins
What's next	Signpost the Academy website or any future sessions where applicable	 We have plenty of online resources to help you as you continue learning To find these resources, you can visit our website. You can either search for "Learn with Halifax" in your browser, or if you're using a smartphone, use the camera to scan the QR code on the screen. It's like a digital shortcut that takes you straight to the webpage Don't forget to save our website as a favourite, so you can easily find it in the future If you're part of the programme, the next session is "Managing your money online." We'll let you know when that will be held If you ever need one-to-one support, remember that we have a Digital Helpline ready to help you 	What's next Lean with Halifax Angle an available specific and the specif	2 mins