There are two ways to record in huddle – using a **Note** and using a **Template**. This guide covers using a Word Template to record.

* Log onto huddle and navigate to your workspace.



* Click the **Templates** folder.

## Copying the template to your folder

Before you can record in a template you must first copy the one you need from the **Templates** folder into your named folder. Your Barnardo’s contact will let you know which template you need to use.



* Click the **three-dot** button to the right of the relevant template.
* Select **Copy** from the menu that appears.



* Click on small grey folder button below the workspace name.



* Click the folder with your name.



* Click the **Copy** button.
* When the **Copy** button changes to **Done**, click the **Go there now** button that appears to its left.



Now you have a copy of the template in your folder you need to edit it to add your recording.

## Editing the template

* Click the name of the template to view the contents.



* Click the **Open in Note Editor** button in the right-hand panel.



* Edit the title to be the date followed by the service user or group the note applies to.
* Edit the main body of the template to add the relevant information.



* Click the **Save** button.
* When the **Save** button text changes to **Saved**, click the **X** button.



* If the “Have you finished…” notice appears, click the **Yes, Unlock it** button.



The next step is to share your recording with your Barnardo’s contact.

## Sharing your recording with your Barnardo’s contact

* Click the **Share this file** button in the right-hand panel.



* Scroll down the list and find your contact, or type part of your contact’s name in the search box above the list.
* Select your contact – the name will appear in the search box.
* Optionally, add a message to the contact.
* Click the **Share** button.
* When the **Share** button changes to **Done**, click it to close the share window.

## What Now?

If you have finished recording you can sign out of huddle. If you have more recording to do you can return to your folder by clicking your name in the row of links above the note title.