

# Training Guide

## Teams OneNote App



To book training or to speak to a trainer, please get in touch via:

e [training@imerseyside.nhs.uk](mailto:training@imerseyside.nhs.uk)

## Disclaimer

Periodically changes to business processes or updates to systems or applications result in the update of training guides and materials. It is the responsibility of the delegate to check that they have the most up-to-date guides. All guides contain a Change Control table at the front which will detail when the document was updated. If you want to check if you have the correct version please email [training@imerseyside.nhs.uk](mailto:training@imerseyside.nhs.uk)





## Change Control

Document Type		Document Title		
Version	Date	Owner	Change	Purpose
V0.1	15 August 2020	Rachel Bertenshaw	Guide Creation	Training Aid
V0.2	18 August 2020	Jo Menary	Minor format changes	Proof Read
V1.1	25 September 2020	Rachel Bertenshaw	Phone number removed	Quality

## Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	18 August 2020	Jo Menary	Lead Trainer
V2.0	25 September	Rachel Bertenshaw	Lead Trainer

## Hints and Tips

	This symbol suggests a tip or a good method of working for speed and efficiency
	This symbol suggests a caution or an action to be aware of
	This symbol indicates an Information Governance warning
	This symbol indicates hints and tips that support digital optimisation

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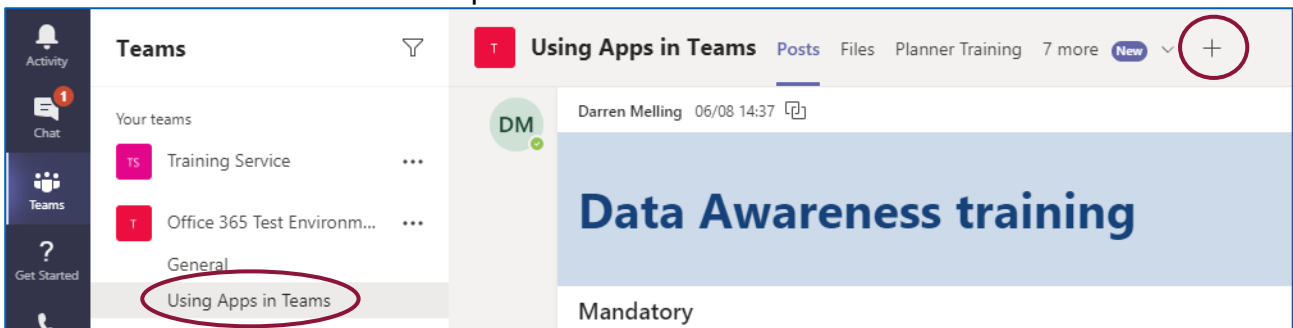
# Use OneNote in Microsoft Teams

OneNote is a Microsoft application and is part of the Office 365 suite. It can be installed as an app within Teams but it does not have all of the functionality of the full Office 365 application.

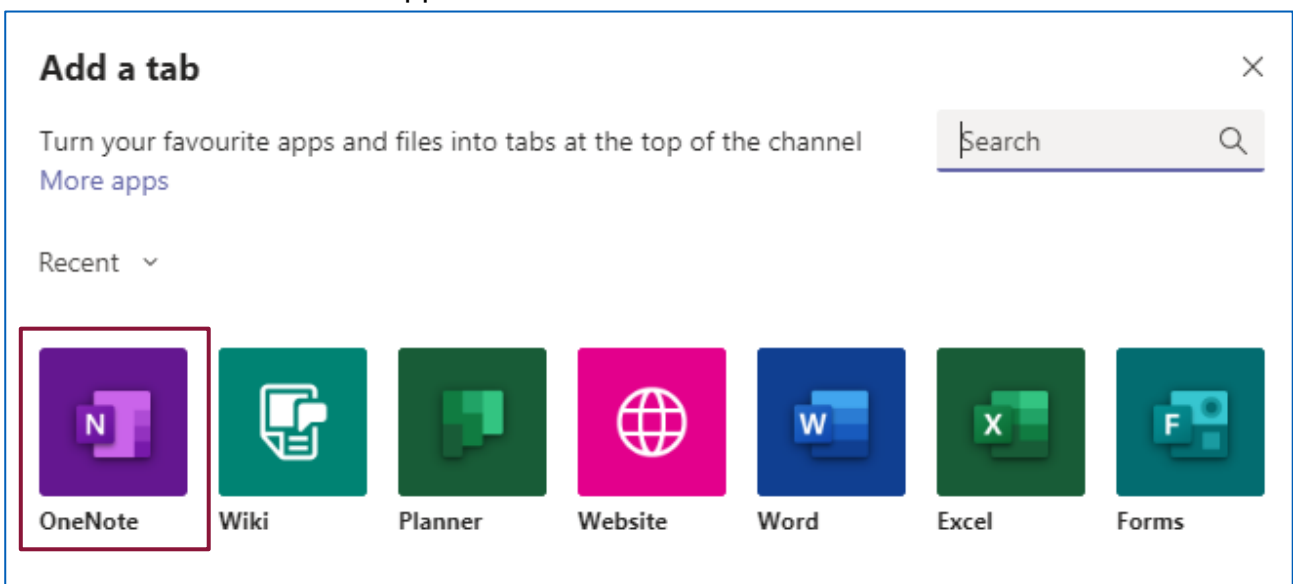
OneNote is a digital notebook and it can be added as a tab to any Channel or Chat. OneNote can be edited and collaborated on within Teams and also in a web browser, via a Microsoft Online Account.

## Add a OneNote Tab to a Team Channel

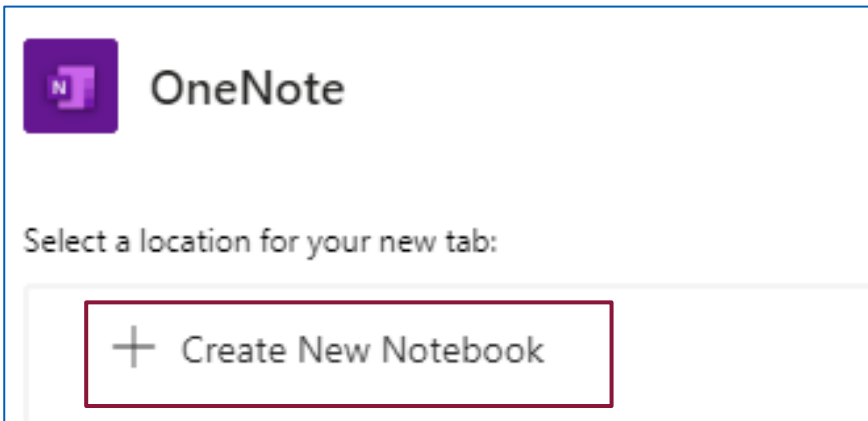
- Go to the [Team Channel](#).
- Click the [+](#) button at the top to [Add a Tab](#).



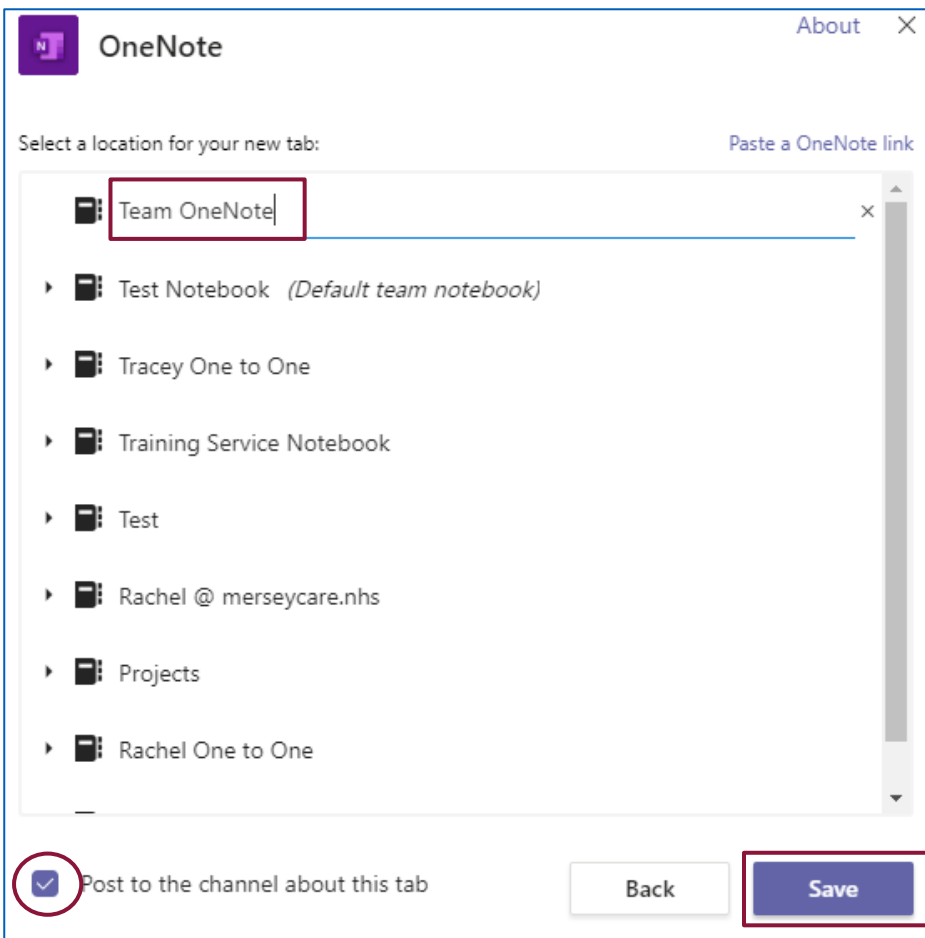
- Select the [OneNote](#) app.



- Click [+ Create New Notebook](#).

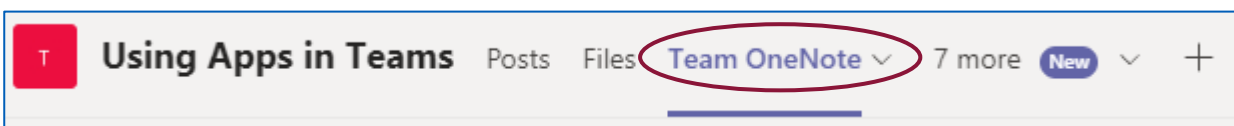


- Enter the [Notebook name](#) → tick/untick [Post to channel about this tab](#) → click [Save](#).



Existing OneNote Notebooks can also be added as a tab, simply select the appropriate title from the list at this stage.

The OneNote tab is now added to the channel.

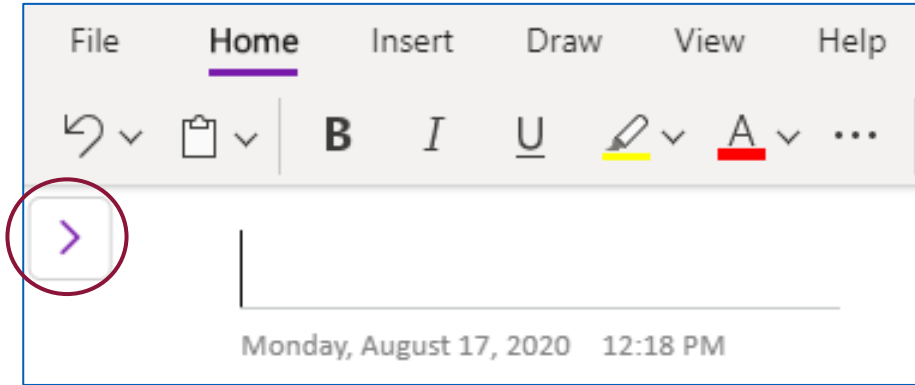


## Edit a Section

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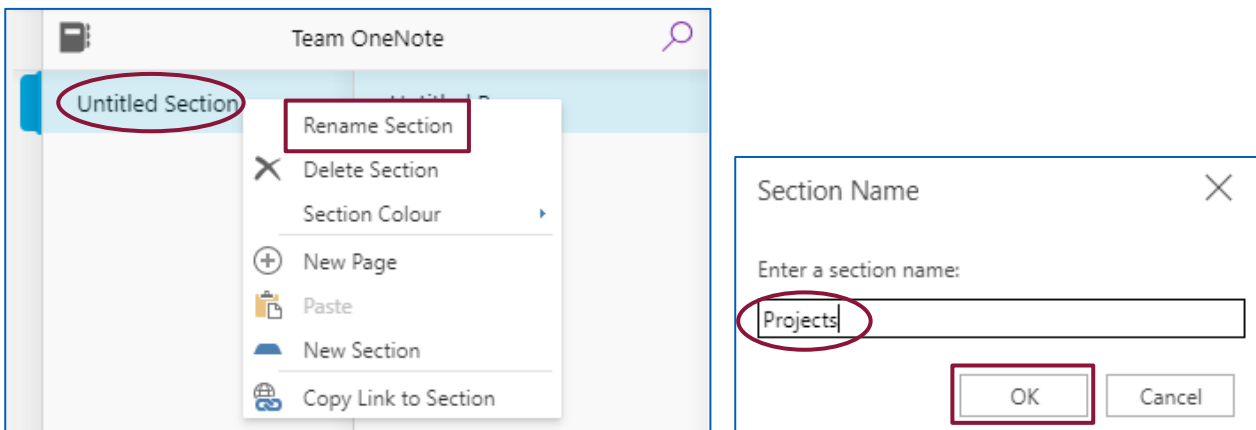
A Notebook [Section](#) is a collection of related pages and there is no limit to the number of sections in a Notebook.

- Click the [Arrow](#) to open the navigation panel.



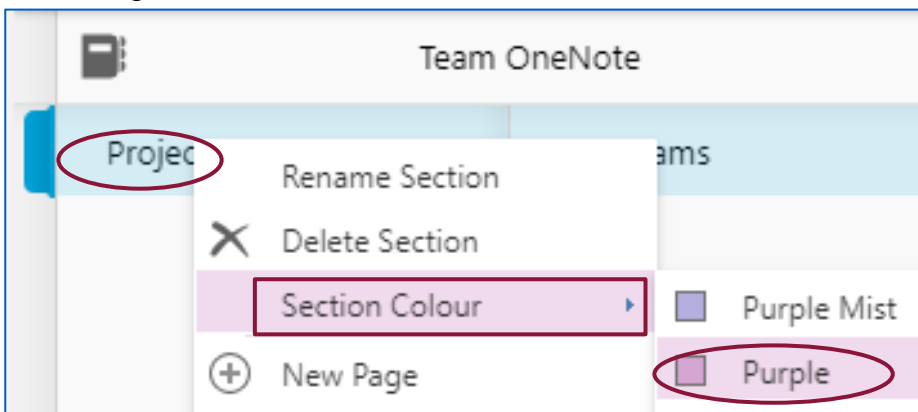
## Rename Section

- Right click [Untitled Section](#) → select [Rename Section](#) → enter [Section Name](#) → click [OK](#).



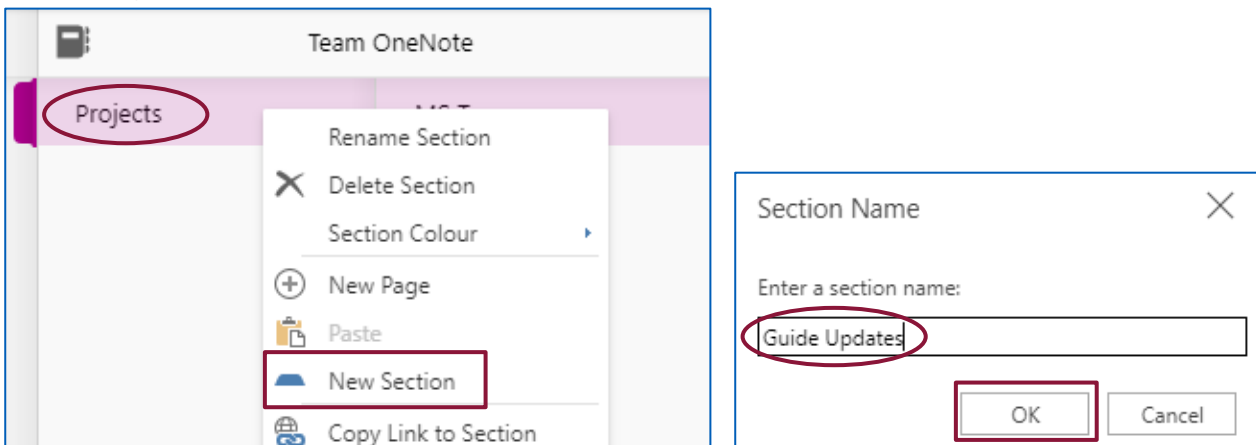
## Change Section Colour

- Right click [Section](#) → select [Section Colour](#) → choose a colour from the list.



## Add a New Section

- Right click **Section** → select **New Section** → enter **Section Name** → click **OK**.



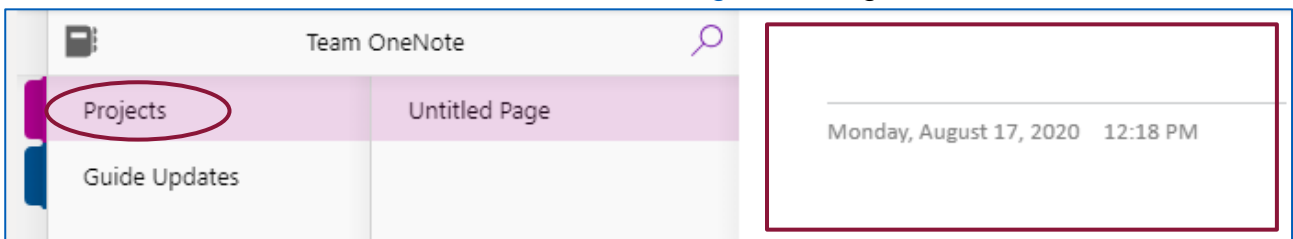
A new section can also be added via the **+Section** button at the bottom of the screen.

## Delete a Section

- Right click **Section** → select **Delete Section**.

## Edit a Page

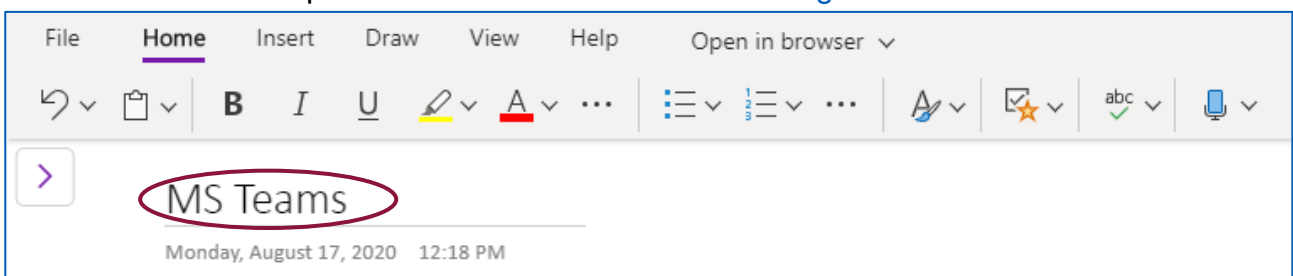
- Select the **Section** to edit → click on the **Page** to the right.



The navigation pane will close and the page can now be edited.

## Add a Page Name

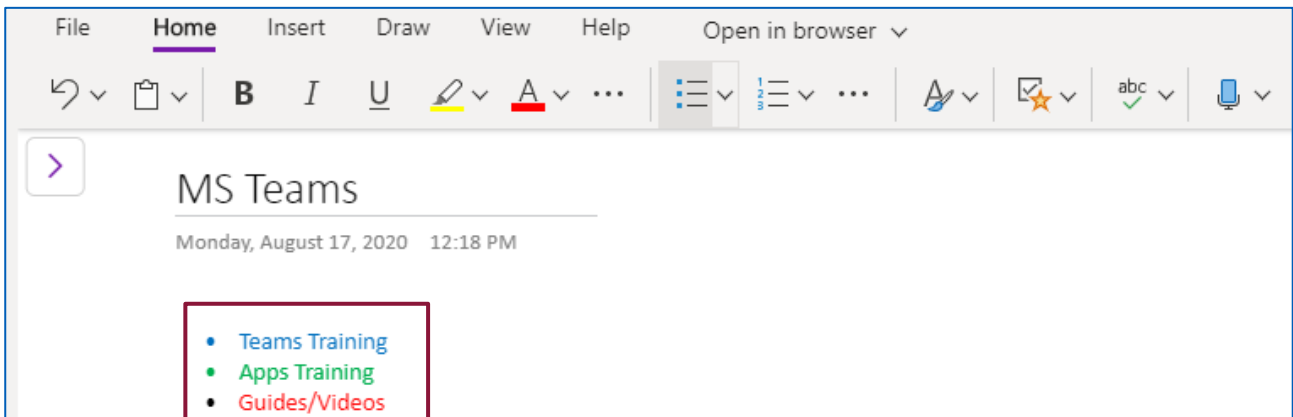
- Click into the space above the date and enter a **Page Name**.



## Add Content to a Page

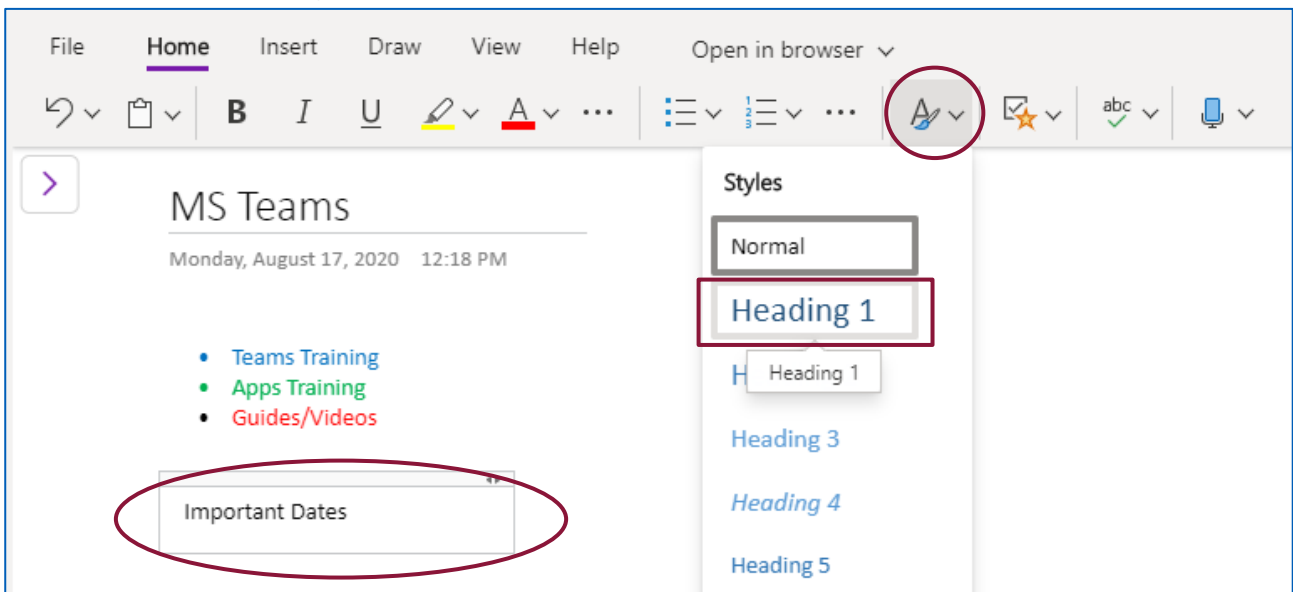
Content can be added to OneNote anywhere on the page. On the **Home** tab, text can be entered and then formatted via the toolbar. There are additional options on the toolbar such **Styles**, **Tags** and **Dictate**. On the **Insert** tab, options include **Table**, **File**, **Picture**, **Link**, **Audio**, **Symbol** and **Emoji**. There is also a **Draw** tab where freehand drawings can be created if required.

- Click on the page and **enter text** → format as required.  
(Use bold, bullets, change font colour etc.)



## Add a Style

- Click on the page and **enter text** → click the **Styles** icon → select a **Style**.

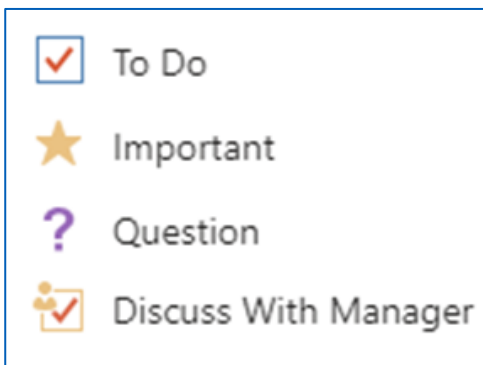


Text can continue to be added underneath the heading and the font style will revert back to normal.



## Add Tags

Tags can be added to content in OneNote and there are many available. Here are some of the most popular:



**To Do** – adds a checkbox next to content which can be ticked off when complete.

**Important** – adds a star next to content.

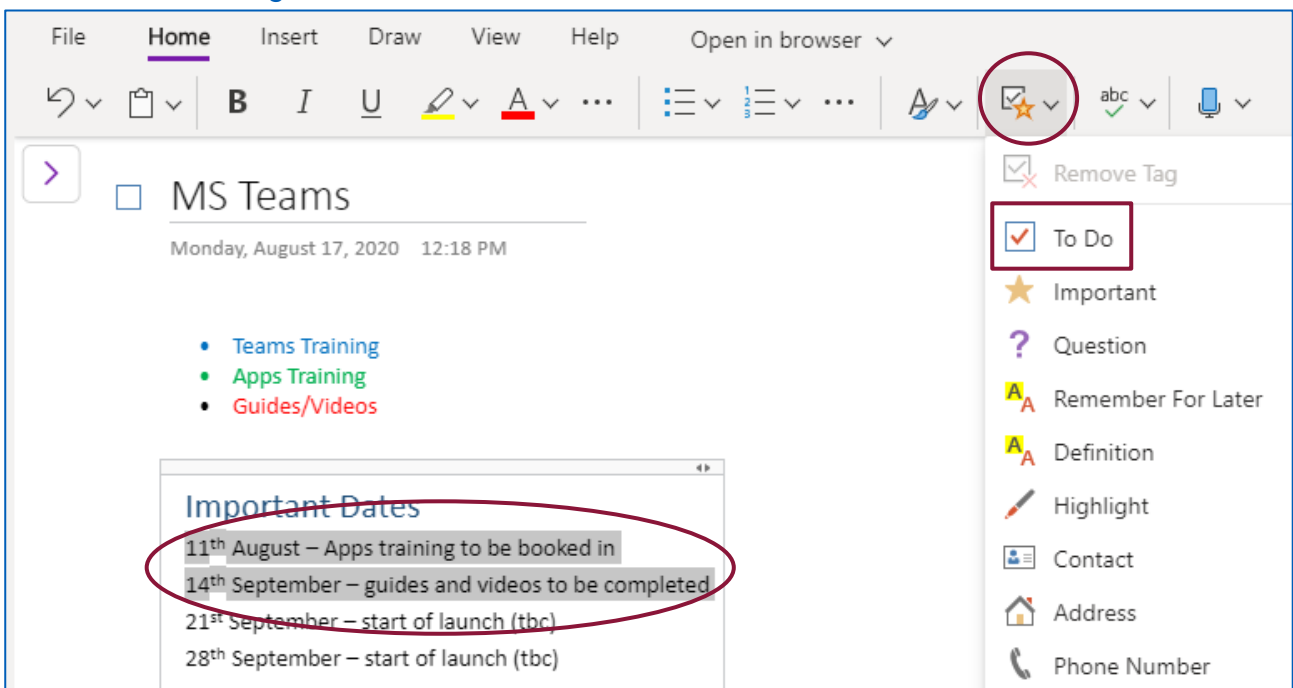
**Question** – adds a question mark next to content to show that more information is needed.

**Discuss with Manager** – adds a checkbox next to content which can be ticked once discussed with manager.

Tags are all added in the same way but the **To do** and **Discuss with Manager** Tags can be updated to show progress. (See example below).

## To do Tag

- Click or highlight the content that requires a **To Do** tag.
- Click the **Tags** icon → select **To Do**.



A **To Do** tag can also be used to create a **To Do** list. The tag is added to the page and then text is entered for the first item.

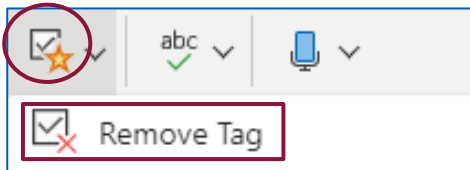
- To add another item, simply press enter and then repeat until the list is complete.
- Tick the items once they are complete.

## Important Dates

- 11<sup>th</sup> August – Apps training to be booked in
- 14<sup>th</sup> September – guides and videos to be completed
- 21<sup>st</sup> September – start of launch (tbc)
- 28<sup>th</sup> September – start of launch (tbc)

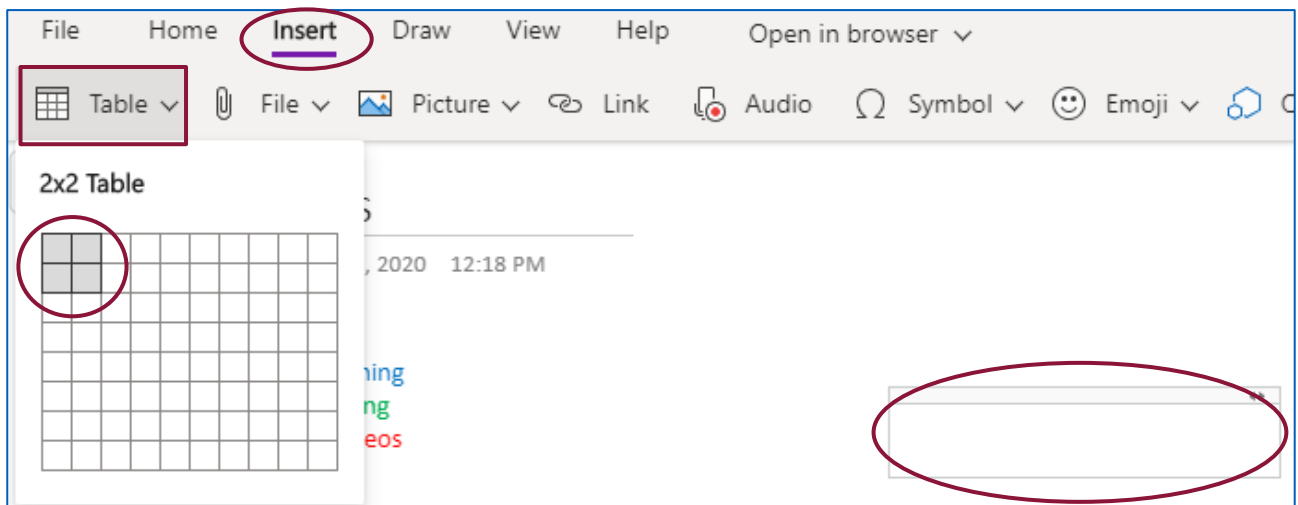
## Remove a Tag

- Click the content next to the Tag.
- Click the **Tags** icon → select **Remove Tag**.

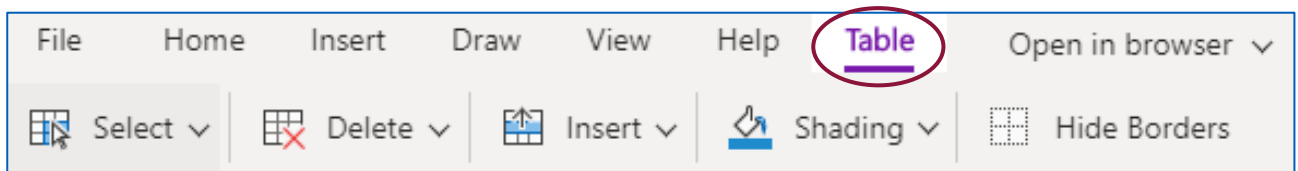


## Insert a Table

- Click the **area of the page** where the **Table** is required → click the **Insert** tab.
- Select **Table** → choose the **Table Dimensions**.

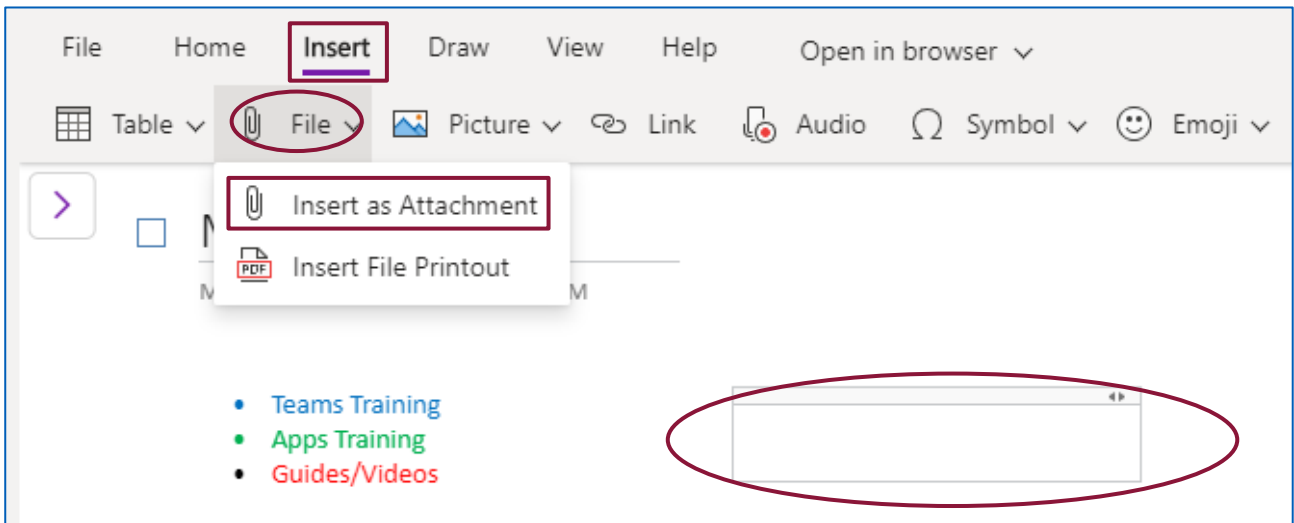


The **Table** will display on the page and can be edited with the **Table** toolbar.

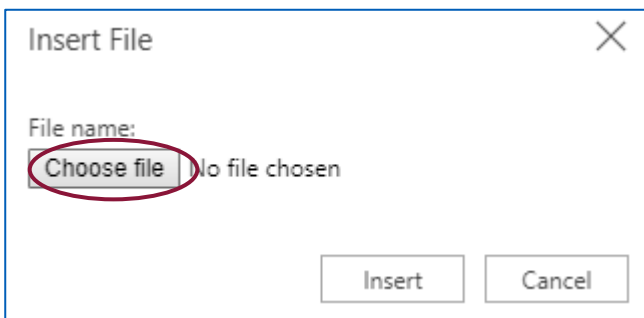


## Insert a File

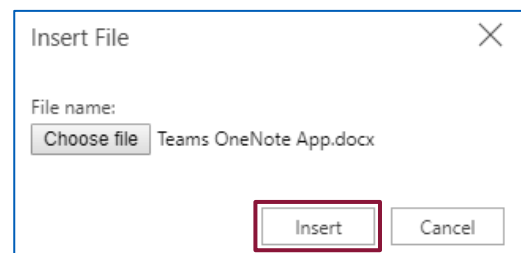
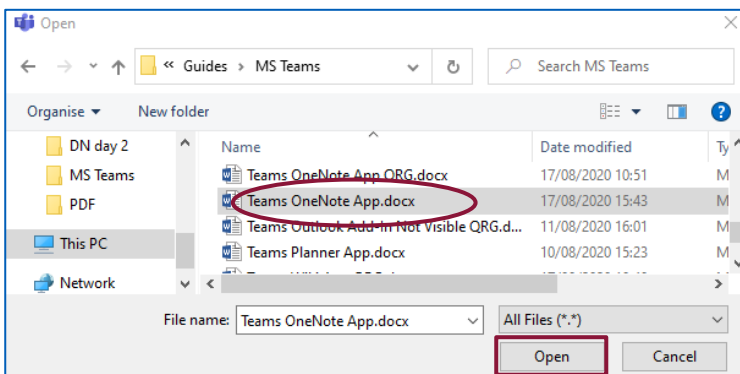
- Click the [area of the page](#) where the [File](#) is to be added → click the [Insert](#) tab.
- Select [File](#) → choose from [Insert as Attachment](#).



- Click [Choose file](#).



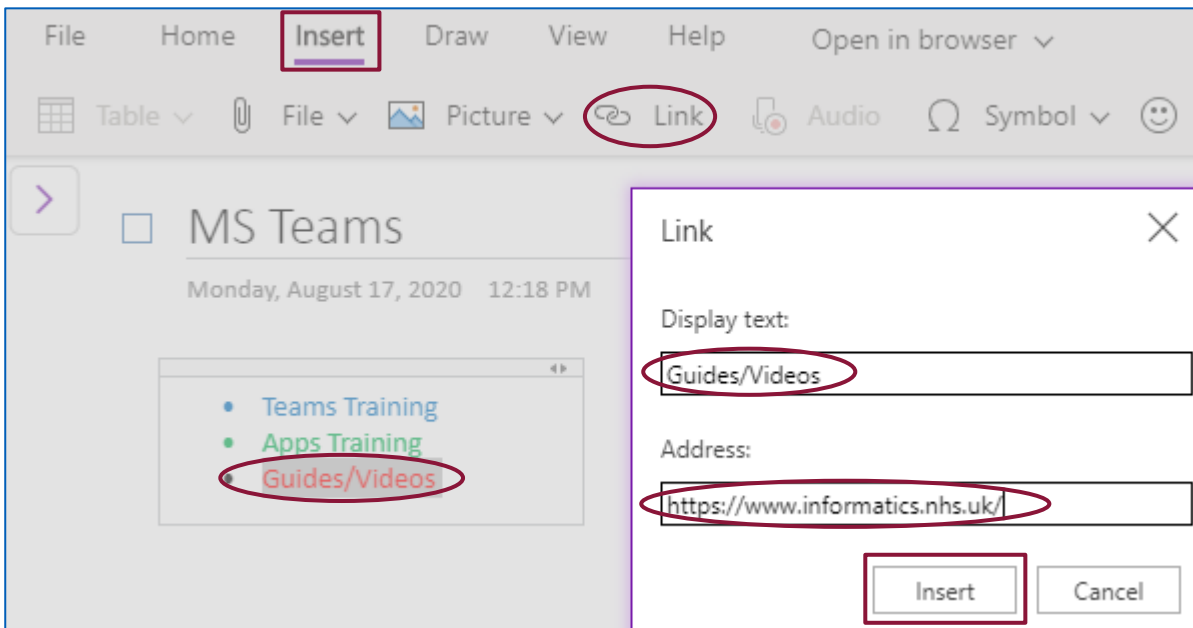
- Navigate to the [File](#) on the PC → click [Open](#).
- Click [Insert](#).



Alternatively, [Insert File Printout](#) can be selected if the contents of the file need to be displayed on the page rather than a file link.

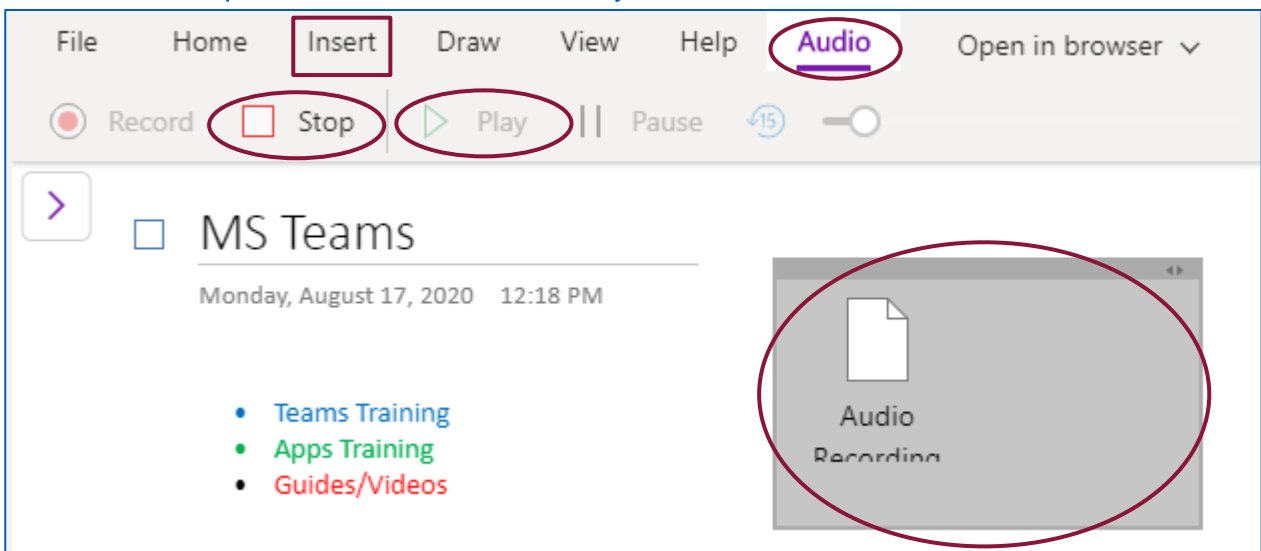
## Insert a Link

- Click the **area of the page** where the **Link** is to be added → click the **Insert** tab.
- Select **Link** → change the **Display text** if needed → enter the **Website Address** → click **Insert**.



## Insert Audio

- Click the **area of the page** where the **Audio** is to be added → click the **Insert** tab.
- Select **Audio** → **Speak** straight away as the audio will start to record immediately.
- Click **Stop** when finished → click **Play** to listen to the audio.

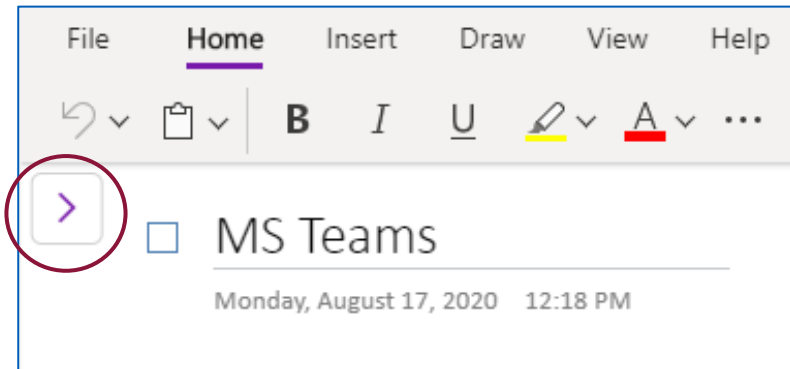


## Delete Content

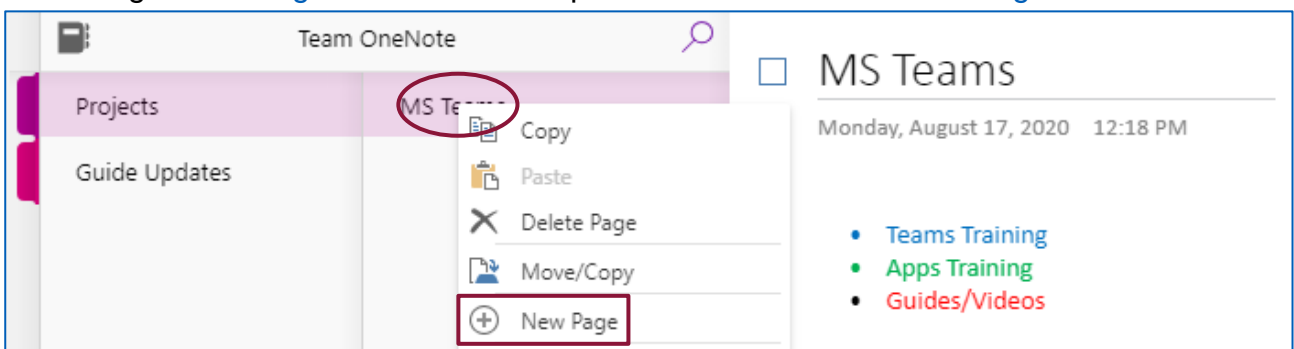
- Select the **unwanted content** → press **Delete** on the keyboard.

## Add a New Page

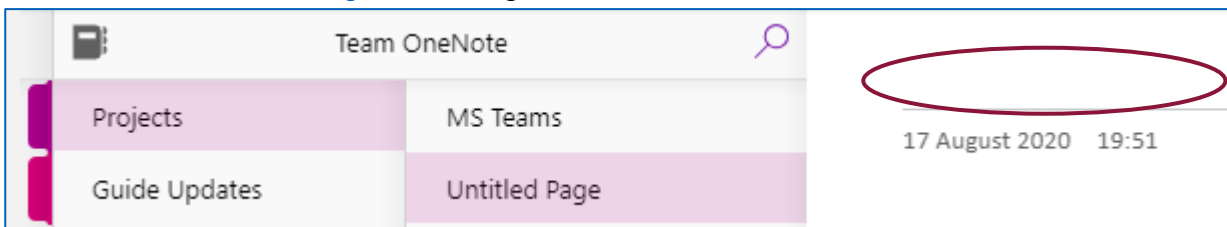
- Click the [Arrow](#) to open the navigation panel.



- Right click [Page Name](#) for the required section → select [New Page](#).



- Click the [New Page](#) on the right.



The navigation pane will close and the page can now be edited.

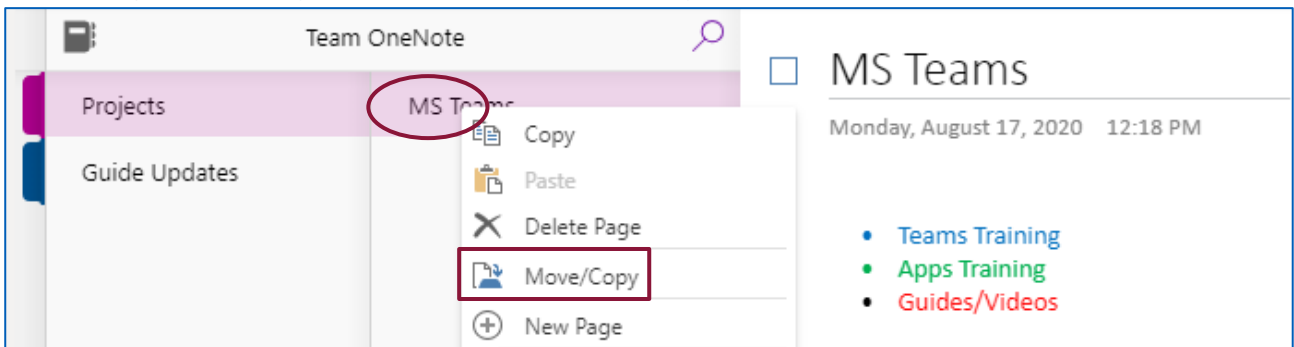
## Delete a Page

- Right click [Page](#) → select [Delete Page](#).

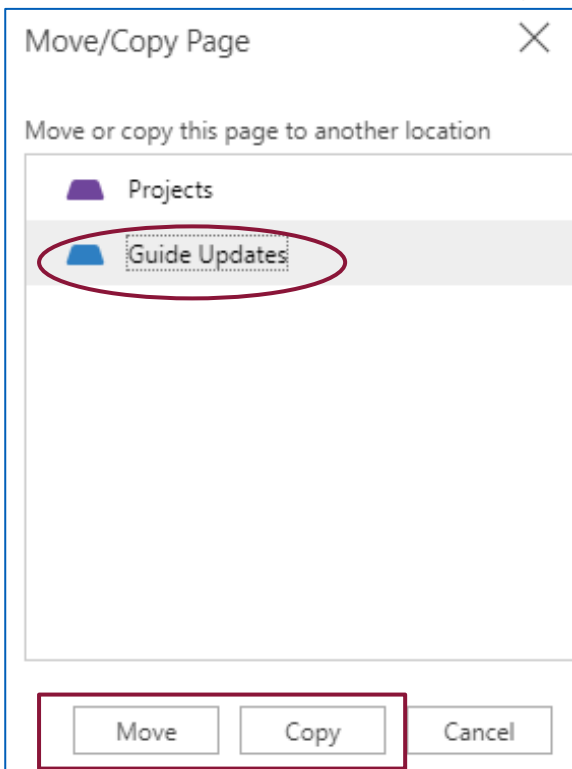
A new page can also be added via the [+Page](#) button at the bottom of the screen.

## Move or Copy a Page

- Right click **Page** → select **Move/Copy Page**.



- Select the **Location** for the page → choose **Move** or **Copy**.



## Contact Details

System Queries	Informatics Merseyside System Support & Development Team	0151 296 7777
IT Queries	Informatics Merseyside IT Service Desk	0151 296 7777
Training Queries	Informatics Merseyside Training Service	<a href="mailto:training@imerseyside.nhs.uk">training@imerseyside.nhs.uk</a>