OneNote: Staff Notebooks
Reference Guide for End Users
Table of Contents

INTRODUCTION ..................................................................................................................................................... 3

NAVIGATING TO AND CREATING A STAFF NOTEBOOK ................................................................................... 3
  NAVIGATING TO STAFF NOTEBOOKS IN OFFICE 365 .................................................................................. 3
  CREATING A STAFF NOTEBOOK .................................................................................................................. 4

ACCESSING STAFF NOTEBOOKS .................................................................................................................... 9
  FROM OFFICE 365 (NOTEBOOK OWNER) ...................................................................................................... 9
  FROM OFFICE 365 (INVITED STAFF MEMBER) ................................................................................................. 10

NAVIGATING WITHIN A STAFF NOTEBOOK .................................................................................................. 12

NOTEBOOK ORGANIZATION ............................................................................................................................ 13
  CREATING SECTIONS ................................................................................................................................. 13
  CREATING SECTION GROUPS .................................................................................................................. 13

ADDING OR REMOVING STAFF MEMBERS .................................................................................................... 14
  ADDING A STAFF MEMBER ...................................................................................................................... 14
  REMOVING A STAFF MEMBER ............................................................................................................... 16

ADDING OR REMOVING NOTEBOOK CO-OWNERS ........................................................................................ 17
  ADDING A CO-OWNER ............................................................................................................................ 17
  REMOVING A CO-OWNER ..................................................................................................................... 18

MANAGING NOTEBOOKS .................................................................................................................................. 19
Introduction

Microsoft OneNote’s Staff Notebooks feature enables you to collaborate notes with colleagues from anywhere you have an internet connection. Sections can be assigned to specific people, making them private from the rest of the group. Additionally, sections can be made available for group collaboration.

Navigating to and Creating a Staff Notebook

Staff Notebooks must be created through Office 365. Once created online, Staff Notebooks can be opened within the local OneNote application.

Navigating to Staff Notebooks in Office 365

1. Open your preferred web browser and type office.towson.edu in the address bar.
2. Enter your primary Towson University email address and password.
3. Click the Sign in button. You will be taken to the Towson University Office 365 main page.
4. Click the app launcher and select Staff Notebook.

![Office 365 app launcher with Staff Notebook selected](image)
Creating a Staff Notebook

Once you launch **Staff Notebook** in Office 365, you will be taken to a **Welcome** screen. This screen has four options (tiles) for creating and editing various aspects of the notebook. By clicking on the **View user guide** link, you will be taken to an online, interactive video regarding **Staff Notebooks**.

1. Click the **Create a staff notebook** tile.

![Create a staff notebook](image)

*Figure 2*

2. Under **What’s the name of your staff notebook?**, click in the text box and give your notebook a name.

![What’s the name of your staff notebook?](image)

*Figure 3*

3. Click **Next**. The **Notebook Overview** screen will appear.

4. The **Notebook Overview** screen describes the different aspects of the sections in the staff notebook. Below are the three section groups:
   - **Collaboration Space** – This space allows the notebook owner and invited staff members to add or edit content. This space is useful for group projects.
   - **Content Library** – This space allows the notebook owner to add or edit content. Invited staff members are able to view and copy the content only. Departmental policies, notices and standards would fit well here.
   - **Private Notebooks** – These are private spaces allocated to each invited staff member. These sections are not visible by other invited staff members. Only the staff member and notebook owner are able to view and edit in these sections. Professional development plans, to-do lists and personal projects are some possible sections that can be added to **Private Notebooks**.
5. Click the **Next** button to continue the staff notebook creation.
6. The **Co-Owner Permissions** screen will appear. OneNote Staff Notebook allows you to add multiple notebook co-owners. These co-owners will have the same permissions as the notebook’s creator (owner). This is not necessary; however, multiple owners of a staff notebook may be beneficial if one of the owners leaves the University.
7. Click in the **Enter names, email addresses or groups**... box and start typing the TU employee’s last name. This field is tied into Towson University’s active directory, so you do not need to know the staff member’s email address.
8. Select the appropriate name from the results in the drop down box.

9. To add another co-owner, repeat steps 7 and 8.
Please note: Some staff members may have multiple email addresses in Towson University’s active directory. To make sure you are selecting the proper email, hover your mouse over the staff member’s name in the results list.

10. Click the **Next** button to continue.

11. The **Add Staff Names** screen appears. This portion of the Staff Notebook creation enables you to add staff members to your notebook. The added staff members will receive an email with a link to the staff notebook once it is completed.

12. Click in the **Enter names, email addresses or groups...** box and start typing the TU employee’s last name. This field is tied into Towson University’s active directory, so you do not need to know the staff member’s email address.

13. Select the appropriate name from the results in the drop down box.

14. To add another staff member, repeat steps 12 and 13.
Please note: Some staff members may have multiple email addresses in Towson University’s active directory. To make sure you are selecting the proper email, hover your mouse over the staff member’s name in the results list.

15. Click the Next button to continue.
16. The Design Private Spaces screen will appear. Each invited staff member has their own private spaces. These private spaces cannot be viewed by other invited staff members. Private spaces are only visible and editable by an invited staff member and the notebook’s owner(s).
17. De-select the checkbox next to any sections you do not want to include in each of the staff member’s private space.
18. Click Add more to create and name a new section.

19. When you are finished, click Next.
20. The **Preview** screen will appear. Before the notebook is created, you are able to see a preview of the sections. This can help you make sure you have provided all of the appropriate sections and added all necessary staff members.

21. By clicking **Staff leader’s notebook** and **Staff member’s notebook** links, you are able to see how the notebook will look for both the owner(s) and the invited staff members.

22. If you need to change any aspect of the notebook, click the blue arrow to return to the previous sections.

![Did we get this right? Please confirm with the visual preview](image)

*Figure 10*

23. Once the notebook is ready, click the **Create** button. The **Setting up OneNote Staff Notebook** box will appear.

24. The **Your notebook...is ready for you!** screen will confirm that the notebook has been created. You may open your **Staff Notebook** by clicking on the links to **Open in OneNote** or **OneNote Online**.

![Your notebook OTS Training Retreat is ready for you!](image)

*Figure 11*
Accessing Staff Notebooks

Since staff notebooks are created to be accessed by multiple users, they must be located in OneDrive. This means that staff notebooks are in the cloud and that they can be accessed from anywhere you have an internet connection. Once you have opened the notebook in your local OneNote application, it will be available in the **Show notebooks** dropdown menu.

From Office 365 (Notebook Owner)

1. Open your preferred web browser software and type `office.towson.edu` in the address bar.
2. Enter your primary Towson University email address and password.
3. Click the **Sign in** button. You will be taken to the **Towson University Office 365** main page.
4. Click the **OneDrive** tile.
5. In the file list, click the **Staff Notebooks** folder and then click on the notebook’s name. The notebook will open in OneNote Online.
6. To open the notebook in your local OneNote application, click the **EDIT IN ONENOTE** button underneath the Notebook’s name in OneNote Online.

   ![OneNote Notebook Interface](Figure15.png)

   **Figure 15**

7. An **External Protocol Request** window will appear. Check the box beside **Remember my choice for all links of this type**.

8. Click the **Launch Application** button. The notebook will open in the local OneNote application.

   ![External Protocol Request Window](Figure16.png)

   **Figure 16**

**From Office 365 (Invited Staff Member)**

*Please note:* Invited staff members will receive an email with a link to the staff notebook upon the notebook’s creation.

1. Open your preferred web browser software and type **office.towson.edu** in the **address bar**.
2. Enter your primary Towson University email address and password.
3. Click the **Sign in** button. You will be taken to the **Towson University Office 365** main page.
4. Click the OneDrive tile.

![OneDrive tile](image17.png)

Figure 17

5. On the left side menu, click Shared with me.

![Shared with me menu](image18.png)

Figure 18

6. Click on the notebook’s name you wish to access. The notebook will open in OneNote Online.

7. To open the notebook in your local OneNote application, click the EDIT IN ONENOTE button underneath the Notebook’s name in OneNote Online.

![OneNote notebook](image19.png)

Figure 19

8. An External Protocol Request window will appear. Check the box beside Remember my choice for all links of this type.
9. Click the **Launch Application** button. The notebook will open in the local OneNote application.

![External Protocol Request](image)

**Figure 20**

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**Navigating Within a Staff Notebook**

OneNote Staff Notebooks are automatically divided into **section groups**. Section groups house common sections.

![Section Groups](image)

**Figure 21**

1. Click on a **section group**. All section tabs in that group will now be visible. Additionally, the name of the **section group** is displayed underneath the notebook name.

![Section Group](image)

**Figure 22**

2. Click on a **section tab** to access any of the pages in that section.

3. To return to the previous level, click the **Navigate to parent section group** icon next to the notebook name.

![Navigate to parent section group](image)

**Figure 23**
**Notebook Organization**

**Creating Sections**

*Sections* can be created in both the collaborative and private spaces in a staff notebook. *Sections* house common pages in OneNote keeping your notes organized. Some examples of *Sections* could be: Professional Development, Meeting Notes or Lists.

1. Click the **Create a New Section** tab.

![Create a New Section tab](Figure 24)

2. Type an appropriate name for the section and press **Enter**.
3. Repeat steps 1 and 2 to add additional sections.

**Creating Section Groups**

*Section Groups* can be created in both the collaborative and private spaces in a staff notebook. These groups can house individual *Sections* or additional *Section Groups* to facilitate further notebook organization. For example, *Section Groups* could be: a specific project, projects in general, Leadership or Services.

1. Right click the blank area next to the **Create a New Section** button.
2. Click **New Section Group**.

![New Section Group](Figure 25)

3. Type an appropriate name for your *Section Group* in the field and press **Enter**.
4. Drag and drop the sections on the newly created *Section Group* tab to add them to the *Section Group*.
Adding or Removing Staff Members

Managing the staff members’ access to the Staff Notebook is integral to the usefulness of the notebook itself.

Adding a Staff Member

1. Click the app launcher in Office 365 and select Staff Notebook.

2. Click the Add or remove staff members tile.

3. Click on the desired notebook name.

4. Click in the Enter names or email addresses box and start typing the TU employee’s last name. The text field is tied into Towson University’s active directory, so you do not need to know the staff member’s email address.
Please note: Some staff members may have multiple email addresses in Towson University’s active directory. To make sure you are selecting the proper email, hover your mouse over the staff member’s name in the results list.

5. Select the appropriate name from the results in the drop down box.
6. To add another staff member, repeat steps 4 and 5.
7. Click the Next button.
8. Click the Update button on the following screen.

A confirmation screen will appear informing you that the notebook is ready. Clickable links are provided to open the notebook in OneNote and OneNote Online.
10. Click the Back to home link to return to the OneNote Staff Notebook options.

**Removing a Staff Member**

1. Click the app launcher in Office 365 and select Staff Notebook.
2. Click the Add or remove staff members tile in the Staff Notebook app in Office 365.
3. Click on the desired notebook name.
4. Click the Remove link next to the corresponding staff member you wish to remove.
5. Click the Next button.
6. Click the **Update** button.

![Update Button](image)

*Figure 34*

7. A confirmation screen will appear informing you that the notebook is ready. Clickable links are provided to open the notebook in OneNote and OneNote Online.

8. Click the **Back to home** link to return to the **OneNote Staff Notebook** options.

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**Adding or Removing Notebook Co-owners**

In some cases, you may want to have additional notebook co-owners to help manage the content and staff members in your **Staff Notebook**.

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**Adding a Co-owner**

1. Click the **app launcher** in Office 365 and select **Staff Notebook**.
2. Click the **Add or remove notebook co-owners** tile in the **Staff Notebook** app in Office 365.

![Add or remove notebook co-owners](image)

*Figure 35*

3. Click on the desired notebook name.

4. Click in the **Enter names or email addresses** box and start typing the TU employee’s last name. The text field is tied into Towson University’s active directory, so you do not need to know the staff member’s email address.

![Add or remove notebook co-owners](image)

*Figure 36*
Please note: Some staff members may have multiple email addresses in Towson University’s active directory. To make sure you are selecting the proper email, hover your mouse over the staff member’s name in the results list.

5. Click the staff member name from the results list.
6. To add another co-owner, repeat steps 4 and 5.
7. Click the Next button.
8. Click the Update button on the following screen.

![Update](image)

Figure 37

9. A confirmation screen will appear informing you that the notebook is ready. Clickable links are provided to open the notebook in OneNote and OneNote Online.
10. Click the Back to home link to return to the OneNote Staff Notebook options.

Removing a Co-owner

1. Click the app launcher in Office 365 and select Staff Notebook.
2. Click the Add or remove notebook co-owners tile in the Staff Notebook app in Office 365.

![Add or remove notebook co-owners](image)

Figure 38

9. Click on the desired notebook name.
10. Click the Remove link next to the corresponding staff member you wish to remove.
11. Click the Next button.
12. Click the Update button.
13. A confirmation screen will appear informing you that the notebook is ready. Clickable links are provided to open the notebook in OneNote and OneNote Online.
14. Click the Back to home link to return to the OneNote Staff Notebook options.
Managing Notebooks

The Manage notebooks feature allows the notebook owner to edit various aspects of the staff notebook. Every notebook you own or co-own will be listed in Manage notebooks. Under the name of each notebook, there are several options from which to choose.

1. Click the app launcher in Office 365 and select Staff Notebook.
2. Click the Manage notebooks tile in the Staff Notebook app in Office 365.

3. Under the name of each notebook, there are several options from which to choose.

<table>
<thead>
<tr>
<th>Staff sections</th>
<th>Enable Staff Leader-Only section group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Itinerary</td>
<td>This section group will be permanently added.</td>
</tr>
<tr>
<td>Professional Development</td>
<td></td>
</tr>
<tr>
<td>Projects</td>
<td></td>
</tr>
<tr>
<td>To-Do</td>
<td></td>
</tr>
<tr>
<td>Add section</td>
<td></td>
</tr>
</tbody>
</table>

- **a.** Add section
- **b.** Rename a section
- **c.** Enable Staff Leader-Only section group
- **d.** Lock Collaboration Space
- **e.** Link

Figure 39

Figure 40
a. **Add Section**
   1. Click **Add section**.

   ![Add section](Figure 41)

   2. Type the section’s name in the field.
   3. Click the **Save** button.

b. **Rename a Section**
   1. Click the pencil icon next to the corresponding section you wish to rename.

   ![Rename a Section](Figure 42)

   2. Type the new name of the section in the text box.
   3. Click the **Save** button.

c. **Enable Staff Leader-Only section group**

   A **Staff Leader-Only section group** is a space that only the notebook owner and co-owners have access. Invited staff members will not be able to see anything in this space. Once this is enabled for the notebook, it cannot be disabled.

   1. In the **Manage notebooks** screen, click the **Staff Leader-Only section group** link.

   ![Enable Staff Leader-Only section group](Figure 43)

   2. Open the staff notebook in OneNote.
   3. Click the **Leader Only** section group.

   ![Leader Only section group](Figure 44)
d. **Lock Collaboration Space**

By locking the Collaboration Space, notebook owners can change the space to read-only. This will prevent any staff members from editing this space. This option can be turned on or off at the notebook owner or co-owner’s discretion.

1. To lock the Collaboration Space, click the switch under the Lock Collaboration Space heading in the Manage Notebooks screen. The switch will turn blue and show that the Collaboration Space is locked.

2. Click the **Save** button.

3. To unlock the Collaboration Space, click the switch again.

4. Click the **Save** button.

e. **Link**

The Link section of the Manage Notebooks screen allows notebook owners to copy the direct link to the Staff Notebook.

1. Left-click in the Link box. The link will be selected.

2. Right-click on the selected link.

3. Left-click on **Copy**.

4. **Paste** your notebook link into email, skype messages and more.