

Last updated: 27<sup>th</sup> April 2020

# Microsoft Bookings - Providing students with a booking system

Microsoft Bookings is an online and mobile app used to schedule appointments. It offers students an at-a-glance view of your availability and allows them to book appointments - within certain parameters which you define.

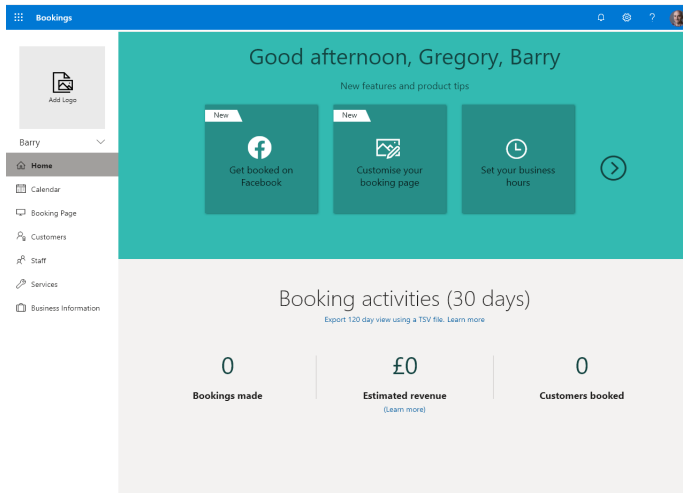
Bookings has three primary components:

- A booking page where students can schedule appointments.
- A web page where staff can manage student lists and schedules, set availability hours, and customise how meetings are scheduled
- A mobile app where staff can see all of their bookings, access student lists and make manual bookings

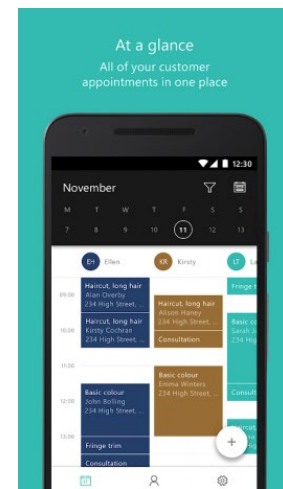
## How Microsoft Bookings works

As with other Office 365 apps, Bookings is a tile in the app launcher. Click the tile to launch the app or select the app launcher, and then select Bookings.

The first time you open the app, you'll see the home page, which includes a left navigation panel and three prominent tiles that guide you through setup and introduce new features.



Desktop app



Mobile app

NB. Throughout Microsoft Bookings, the language is quite business-focussed: for our purposes, 'customer' can be read as *student* and 'business' as *member of staff*.

## Using Microsoft Bookings

To manage student appointments with Microsoft Bookings, only a subset of its features will be used. The key tasks are set out below:

### 1. Create a bookings calendar

Microsoft Bookings uses data in your NTU Outlook calendar by default; existing appointments will already be shown as times when you are unavailable for bookings. If needed, use your bookings calendar to block out any additional periods of unavailability (measured in *whole days*) such as holidays, university closures and so on.



## 2. Set your availability

Aside from your existing calendar appointments, you will want to set your daily *routine* working hours - start time and finish time - and to block out lunch breaks and any regular non-working days.

By default, the business hours in the Bookings app are set to 8:00 a.m. to 5:00 p.m., Monday to Friday. Times are provided in 15-minute increments.

1. In the navigation pane, select **Business information** page.

The screenshot shows the 'Bookings' app interface. The left navigation pane has 'Business information' highlighted with a pink box. The main content area is split into two panels. The left panel, 'Business information', has a blue header and contains fields for business name, address, phone, email, and website. The right panel, 'Business hours', is highlighted with a red box and contains a table for setting hours for each day of the week. The table has columns for the day, start time, end time, a cancel button (x), and an add button (+).

Day	Start Time	End Time	Cancel	Add
Sunday	Closed			+
Monday	8:00 AM	5:00 PM	x	+
Tuesday	8:00 AM	5:00 PM	x	+
Wednesday	8:00 AM	5:00 PM	x	+
Thursday	8:00 AM	5:00 PM	x	+
Friday	8:00 AM	5:00 PM	x	+
Saturday	Closed			+

2. Under **Business hours**, use the drop-down menus to select start and end times for each day.
3. Click + to add start- and end-time selectors.

To block out a portion of the day, e.g. for lunch, enter separate business hours for the morning and afternoon periods, respectively. Here's an example:

1. Select a start and end time for Thursdays. In this example we'll set 8 a.m. to 1 p.m:
2. Select + to create a new row for Thursday.

Enter information about your business hours.

Sunday	Closed			+
Monday	8:00 AM	6:00 PM	x	+
Tuesday	8:00 AM	6:00 PM	x	+
Wednesday	8:00 AM	6:00 PM	x	+
Thursday	8:00 AM	1:00 PM	x	+

3. In the new row, select 2:30 p.m. for the start time and 6:00 p.m. for the end time.

Enter information about your business hours.

Sunday	Closed			+
Monday	8:00 AM	6:00 PM	x	+
Tuesday	8:00 AM	6:00 PM	x	+
Wednesday	8:00 AM	6:00 PM	x	+
Thursday	8:00 AM	1:00 PM	x	+
	2:30 PM	6:00 PM	x	

4. Select Save

### 3. Customise your Booking Page

The Booking Page allows students to see your availability and make bookings. Configure some basic settings to customise how meetings are scheduled.

1. In the navigation pane, select **Booking page**.
2. Edit the following settings:

**Booking page access control:**

- Select **Require an Office 365 account from my organisation to book**. This restricts the visibility of the page to NTU staff and students

**Scheduling policy:** set, according to preference:

- Time increments (determines the intervals between appointments)
- Minimum lead time (in hours)
- Maximum lead time (in hours)

**Email notifications:** toggle (on-off), according to preference:

- Email notifications for yourself

- Email meeting invites for the student

The screenshot shows the 'Bookings' settings interface. A sidebar on the left contains navigation options: Home, Calendar, **Booking Page** (highlighted with a red box), Customers, Staff, Services, and Business Information. The main content area is divided into several sections:

- Booking page access control** (highlighted with a red box):
  - Require an Office 365 account from my organisation to book
  - Disable direct search engine indexing of booking page [Learn more](#)
- Customer data usage consent**:
  - Show a personal data collection and usage consent toggle along with a message on my booking page
  - Text input field: Enter your personal data collection and usage terms here.
- Scheduling policy** (highlighted with a red box):
  - Settings for when customers can book services
  - Time increments: Show available times in increments of: 30 minutes
  - Minimum lead time: Minimum lead time for bookings and cancellations (in hours): 1
  - Maximum lead time: Maximum number of days in advance that a booking can be made: 30
- Email notifications** (highlighted with a red box):
  - Notify the business via email when a booking is created or changed
  - Send a meeting invite to the customer, in addition to the confirmation email.

At the bottom of the page, the word 'Staff' is visible.

3. Select **Save and publish**.

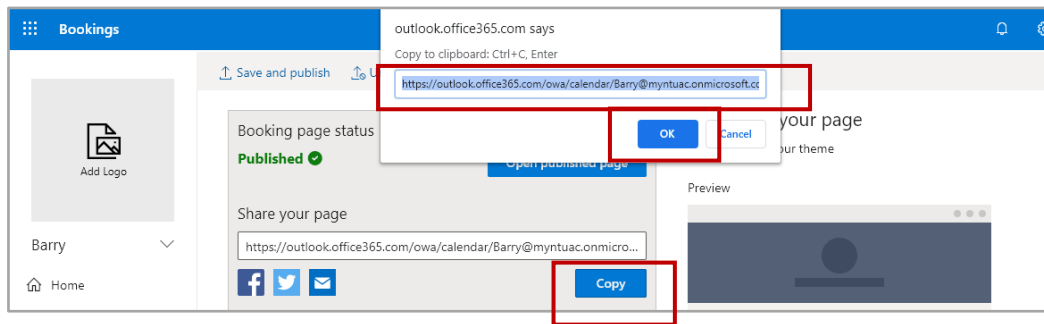
↑ Save and publish

## 4. Share your Booking Page

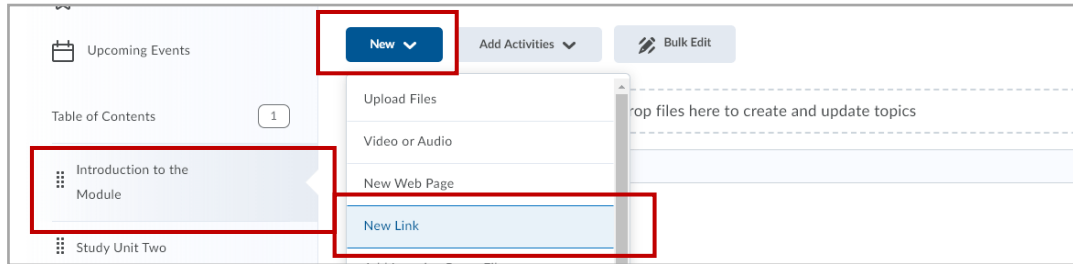
Once you have created your bookings page, you can share it with students via the link generated on the Bookings page. To share via NOW, follow these steps:

1. Under Share your page, select **Copy**.

- Copy the highlighted link (CTRL-C) and select **OK**.

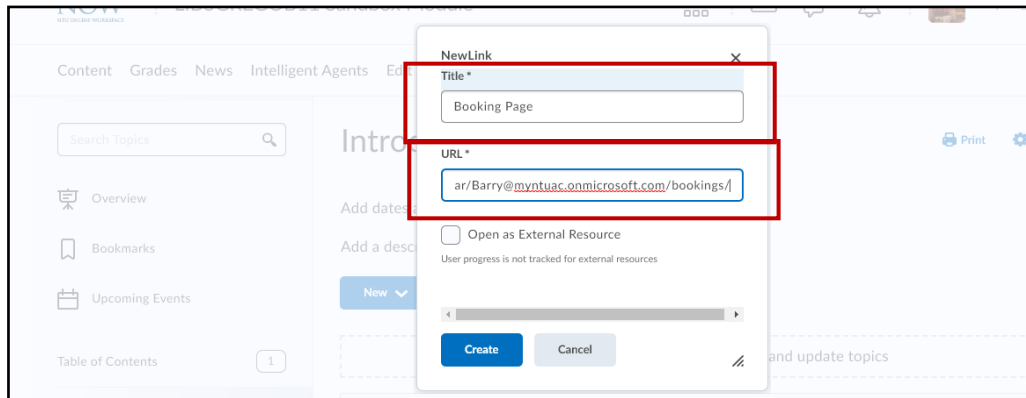


- Next, log into NOW and go to the relevant learning room.
- Select **Content** and find the relevant unit, or create a new one.
- Select **New > New Link**.



- Under **Title**, enter 'Booking Page' or something similar.
- Under **URL**, paste in the link you copied previously (CTRL-V).
- Select **Create** to complete the process and make the page visible to students.





Students following the learning room link will see your Booking Page:

