

A Quick Guide to Microsoft Bookings

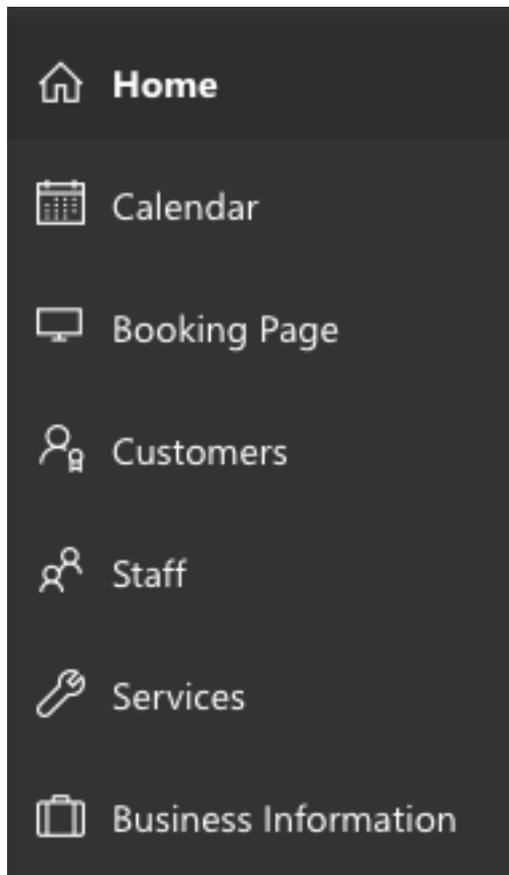
Microsoft Bookings can be used to allow students and staff to request time slots with some bookable entity (a person, an item, or a location).

You can access Bookings with the “waffle” in Office 365 (9 dots in the upper-left corner: ).

Select “Bookings” (you might have to select “All apps” to see it). If you don’t see it, ask IS (<https://www.ed.ac.uk/information-services/help-consultancy/contact-helpline>) to turn it on for you. The first time you visit Bookings, you will see a full-page advertisement with a “Get it now” button. Click that button.

Click on “Add a booking calendar” to create your first booking calendar. Make up a name and use “Colleges & Universities” for “Business type”.

There will be a menu along the left side of the screen:



Home will give you an overview and the option to export a TSV file of your appointments (tab-separated values can be imported into Excel)

Calendar provides an Outlook-style view of the appointments that have been booked.

Booking Page will let you configure the page that your users will interact with.

Customers gives you data on who has used your page (seldom required).

Staff lists all the resources that can be booked your calendar.

Services lets you categorise the resources into types of meeting (“workshop”, “online chat”, etc.)

Business Information allows you to set up company-wide policies and information.

Here are some recommended settings:

Booking Page

- Check: “Require a Microsoft 365 or Office 365 account from my organisation to book”
- Check: “Show a personal data and usage consent toggle...” and include something along the lines of “The information you provide will be used to arrange appointments.”

- Time increments: 60 minutes
- Minimum lead time in hours: 36
- Maximum lead time in days: 30
- Check: “Always show time slots in business time zone”
- Check: “Send a meeting invite to the customer”

Business Information

- Privacy policy URL: <http://www.ed.ac.uk/about/website/privacy>
- Set up general business hours that can be used as a default. M-F 9:00-17:00 is good.

Setting up staff

Next, you will want to set up staff members (probably just you). The easiest way is to look up people in “Name”. It’s a good idea to leave “Events on Office calendar affect availability” checked – that way, bookings will not clash with pre-existing appointments in Outlook. You can either use the default business hours or set a unique schedule for the staff member. If you have multiple staff members, make the other staff “guests” unless it is okay for them to see the details of ALL the other appointments.

Setting up services

You should assign staff members to “Services” next. These services should generally be named according to what will be covered (e.g., “Dissertation consultation”) or how it will be delivered (e.g., “Quick chat in Teams”).

- Come up with a name and description.
- It’s probably best to check “Add online meeting”, which adds Skype and Teams links.
 - o You can always start the meeting manually, however, through Teams.
- If you don’t want multiple appointments in a row, you can use “Buffer time” to space things out automatically.
- It’s also a good idea to check “Let customers manage their appointment when it was booked by you...”.
- Custom fields are like survey questions. They can be very useful if you want information ahead of time. You can select what the students will see by clicking on the grey boxes around the text descriptions. If there’s no grey box, it won’t appear. You can choose to make some of these mandatory.
- It’s a very good idea to set two custom reminders. It’s often best to send these reminders to both the customer/student AND the staff member (“Send reminder to”: “All attendees”)
- In “Assign staff”, choose which staff members are to be assigned to the service in question.

Launching the page

At this point, go to “Booking page” and select “Save and publish”. You’ll get a link in “Share your page” that you can distribute freely. These booking pages can also be embedded within SharePoint pages.

What happens next?

When students book you, an invitation will arrive. You can simply add it to your calendar and check the details from Outlook in the standard way. If you delete the invitation from your personal calendar, that won't delete the appointment in Bookings (or the one in the customer/student calendar). If you want to delete the appointment completely, delete it from within "Calendar" in Bookings. You can also reassign appointments by double-clicking them, deselecting the staff member and choosing another one

FAQs (send your questions to James.Donaldson@ed.ac.uk)

My invitations keep disappearing when I accept them! What should I do?

Some people will have their inboxes set up to automatically delete invitations when they are accepted. If you don't want invitations to disappear, do one of the following:

1. Outlook Web: Click on the gear symbol in the upper-right corner, then "Calendar", and then "Automatic Processing" -> "Invitations". Deselect "Delete invitations and responses that have been updated".
2. Outlook 2016 (Windows): "File" -> "Options" -> "Mail" -> "Send messages" and then deselect "Delete meeting requests and notifications from Inbox after responding".

How do I set time off for a staff member?

Go to "Calendar", click "Time off" at the top, choose the staff member and set dates. If it's your own availability you want to change, you can also book time off by creating appointments/time off in your personal Outlook calendar (if you've checked "Events on Office calendar affect availability").

What if I just want to set up an easy way for my students to book me for 1-hour slots?

Add one staff member (use your account). Then add one service ("Consultation") and select your staff name. Save and publish the booking page. Distribute.

What if I want to set up a calendar to book non-human entities, like equipment or rooms?

Staff members don't need to be humans. Make up a name and then assign an e-mail that you check to that "staff member". All e-mail addresses must be unique (i.e., you can't set up multiple rooms with your own e-mail address). This is not a major problem, however, as most of us have several proxy addresses (check in Outlook's Address Book: many of us have UUN@ed.ac.uk, UUN@exseed.ed.ac.uk, and UUN@uoel.onmicrosoft.com). Make sure to uncheck "Events on Office calendar...".

Can I allow multiple students to book a single session?

Yes. Edit "Maximum Attendees" in Services.