

Getting Started and Tips for Bookings Calendars

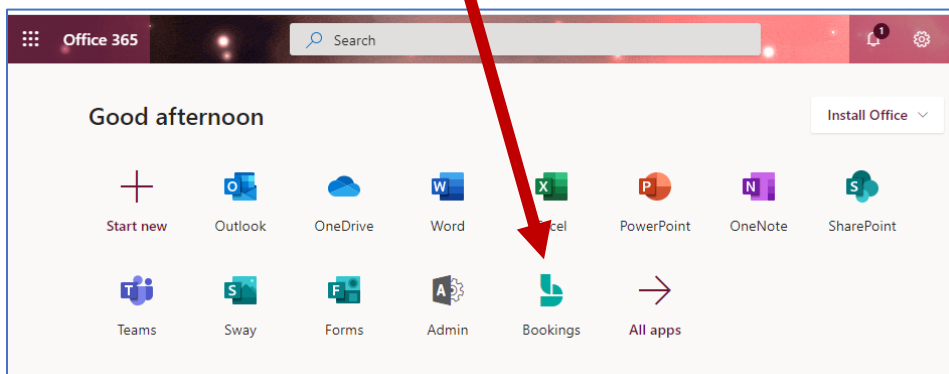
Microsoft Bookings is a scheduling application that is part of your Office 365 account. It can be used for academic advising, office hours, or other types of appointments. Bookings provides an easy to set up, customizable web page that allows students to find available times and book appointments with you. Appointments can be set up as online Teams meetings or in-person.

This guide contains information for getting started and tips for your Bookings calendar. Visit <https://www2.ccsu.edu/itservicecatalog/?id=155> for more detailed instructions and self-help links.

Keep in mind that Microsoft Bookings is intended for small business use, so the terminology is business focused. Where prompted for business information, you would consider your department the business (for departmental Bookings calendars) or yourself the business (for faculty/advising Bookings calendars).

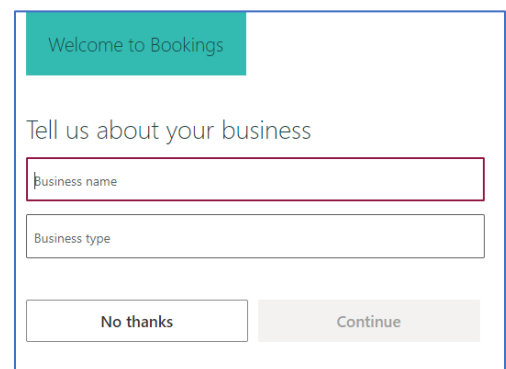
Accessing Microsoft Bookings

1. Microsoft Bookings is only available via the web. Navigate to <https://office.ccsu.edu> and log in with your CCSU e-mail address and password.
2. From the list of apps, click on Bookings:



If the Bookings icon is not on the main app screen, you may need to click "All apps" and then Bookings.

3. First-time Access: you may first be prompted with a "Get it now" button – click that to continue. You will then be prompted for information about your first Bookings calendar. Enter the name of your Bookings calendar in the "Business name" field and click Continue (the "Business type" is not required).



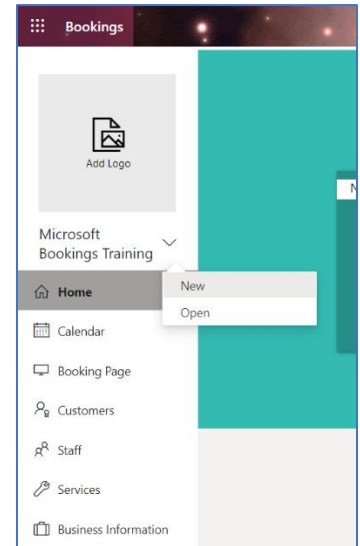
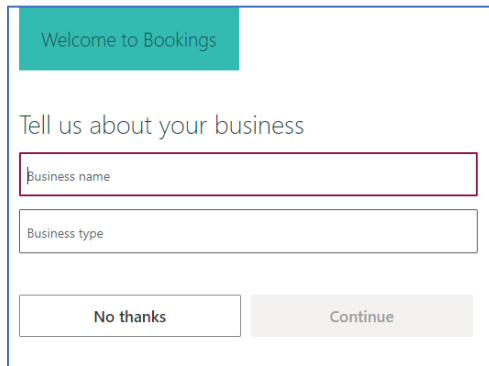
The image shows the "Welcome to Bookings" setup screen. It has a teal header with the text "Welcome to Bookings". Below that, it says "Tell us about your business". There are two input fields: "Business name" and "Business type". At the bottom, there are two buttons: "No thanks" and "Continue".

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Creating Additional Microsoft Bookings Calendars

There is no limit to the number of Bookings calendars you may create. After creating your first one, each time you open Bookings it will open the last Bookings calendar you worked with. To create new Bookings calendars:

1. Click on the down arrow next to name of the current Bookings calendar, then click New.
|
2. Enter the name of your Bookings calendar in the “Business name” field and click Continue (the “Business type” is not required).



Detailed Instructions for Microsoft Bookings

Navigate to <https://www2.ccsu.edu/itservicecatalog/?id=155> for detailed information on Bookings and training links. Click the “Microsoft Bookings Training site” link for very detailed instructions for creating a Bookings Calendar and using Bookings. It is highly recommended that you review each step carefully before or during the creation of your Bookings Calendar. There is also a recording a Bookings training session we did at CCSU on the IT Self-Help page for Microsoft Bookings.

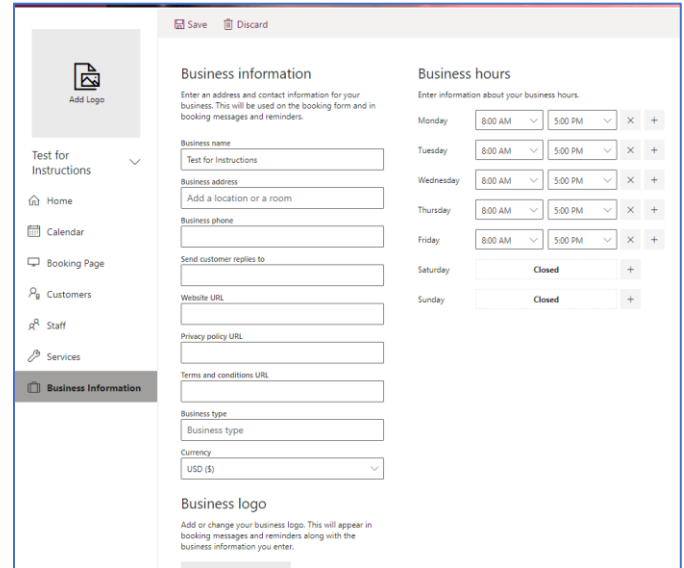
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Tips for Bookings Calendars

This section highlights specific fields in each section that may need further clarification or tips. It does not cover every field in that section.

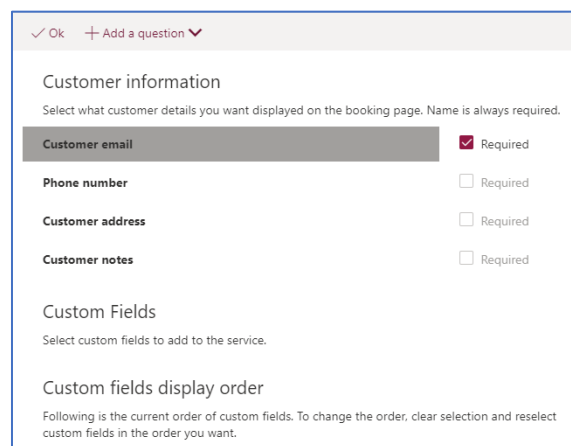
Business Information section

- Enter contact information as you want it included on the Bookings registration page and in emails.
- Fields such as privacy policy, terms, currency may be left blank.
- Send customer replies to field – for individual calendars (faculty office hours for example), if you put your email here and also select the option to email staff on other screens then you will get two emails for each booking.
- Business hours - set the overall business hours, you don't need to be very detailed here.



Services section

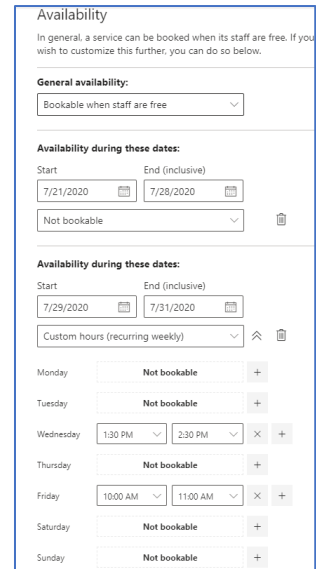
- Use the “Add online meeting” toggle to make the service an online Teams meeting.
- The Maximum attendees allows for group appointments, this can be used for group information sessions, training, or other types of appointments where you may want to book multiple people into the same time slot.
- At least one “staff” needs to be assigned to the service. If the calendar is for your own office hours, you would click your own name. If several staff members in your office can be booked for that type of service, then select multiple names. When a user books, they can either be presented with a choice of names or be automatically assigned to the next available person.
- Custom fields – click on Modify to create new fields to gather needed info (such as 8-digit ID or major) and to toggle default fields on or off.
 - A name field is always displayed by default, it is not shown in the customer information section because it cannot be toggled off.
 - Click the name of a field to toggle it on or off. When a field is on, it is highlighted in a darker gray and when it is off it shows as either white or lighter gray.
 - Click “Add a question” to add custom fields. There are two types of custom fields – text questions or drop-down question. After you create a custom field, you must click on it to toggle it on.



- Text messaging – this is a preview feature and may not work properly

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- Publishing options is used to show or hide services from the Bookings site. This needs to be checked to see all options for the service.
- Online Scheduling options – when this is checked, it uses the default scheduling policy from the Booking Page section. Uncheck to create custom dates/hours for each service.
- Scheduling policy:
 - Time increments indicates how available times are displayed. For example, a time increment of 30 minutes means times will show as 1:00, 1:30, 2:00 whereas 15 minutes means they would show as 1:00, 1:15, 1:30, 1:45, 2:00
 - Lead time – minimum is how far in advance someone can book (for example, a minimum lead time of 1 hour would mean they can book the appointment an hour before the scheduled start time). Maximum is how far out they can book (for example, a maximum lead time of 30 days means the calendar will not display any availability past 30 days from the current date).
- Email Notifications – notify the business will send an email the address on the Business Information page. Send a meeting invite sends a calendar invite that the attendee can accept to put on their calendar.
- Staff – if you have more than one staff member assigned to the service, checking this box allows the customer to select a specific name. If unchecked, then the customer gets randomly assigned to available staff.
- Availability:
 - If you do not set custom hours, then the service is generally available when staff are free during the business hours listed on the Business Information page. Click the “Set different availability for a date range” link to set custom hours.
 - From the drop down, select Custom Hours (recurring weekly) or “Not bookable”. A good use of “not bookable” is when you will be on vacation or out of the office, or if your office is not going to offer the service for a very specific date range.
 - For custom hours, use the X next to the day of the week to exclude that day (for example, click the X next to Friday if you will not offer this service on Fridays). To add multiple sets of times on the same day, click the “+” next to the day of the week (for example, the service is not available during lunch hours so you may have it set from 8am to 12pm then again from 1pm to 4pm). You may need to set up several blocks of custom hours to block out unavailable dates or different hours for different weeks.



Availability

In general a service can be booked when its staff are free. If you wish to customize this further, you can do so below.

General availability:
Bookable when staff are free

Availability during these dates:
Start: 7/21/2020 End (inclusive): 7/28/2020
Not bookable

Availability during these dates:
Start: 7/29/2020 End (inclusive): 7/31/2020
Custom hours (recurring weekly)

Monday	Not bookable	+
Tuesday	Not bookable	+
Wednesday	1:30 PM - 2:30 PM	X +
Thursday	Not bookable	+
Friday	10:00 AM - 11:00 AM	X +
Saturday	Not bookable	+
Sunday	Not bookable	+

Staff section

- When you create a new Bookings calendar, you are the only staff by default and are granted the admin role.
- You may add additional users as staff to assign them to services or allow them to be an administrator of the calendar.
- Click Add Staff, then click in the Add people field and start typing the person’s last name so that it searches for them within Office 365. Click on their name when it appears (don’t type the name manually, you must select it from the list to get the appropriate account).
- Assign a role – either administrator (can do all functions) or viewer (can only view).

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- Email notifications – this emails staff when they are booked. If you are the only staff member and also have your email address listed as the business email you will get two emails for each booking so you may want to uncheck it here.
- Availability:
 - “Events on Office calendar affect availability” - check this box if you want the Bookings calendar to take your existing calendar into account so that you are not double-booked.
 - “Use business hours” – leave this checked if you or the staff member works the hours listed on the Business Information page. Uncheck this box and set custom hours for each staff if they work different hours than what is listed on the Business Information page.

Booking Page section

- Booking page access control – check “require a Microsoft or Office account from organization” if only want to allow CCSU students/staff to book using the Bookings site. If left unchecked then anyone can book.
- These items only need to be changed if you set the Online Scheduling option to use the business policy (see the Services section for explanations):
 - Scheduling policy
 - Email notifications
 - Staff
 - General availability
- Region and time zone settings – ensure “Always show time slots in business time zone” is checked so that available times always show in CCSU’s time zone. If unchecked, they will show in the time zone of the device used to book the appointment and will cause confusion.

Calendar section

- The Calendar shows booked appointments. In multi-person bookings, it also shows the number of slots booked out of the total slots.
- All changes (moving to a different timeslot, cancelling, change of staff) need to be done through the Calendar section of the Bookings site. Making changes on the Outlook calendar may negatively impact the booking itself.
- Click on the appointment from the Calendar section then click Edit to access the attendee information or to edit it.
DO NOT click on “Cancel” as that will cancel the entire booking. If you click the appointment but don’t want to make any changes, just click outside of it.
- There is no way for you to cancel one person out of a multi-person booking. If you click their name and click “Cancel booking” that will cancel the entire booking and every will get a cancellation notice. If someone needs to cancel, direct them to cancel via the email they received.
- If you do need to cancel the booking, click on the appointment then click Cancel and you will be prompted to enter a reason for cancellation that all the attendees will receive in the cancellation notice.

