

Bookings 101

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What is Bookings

Microsoft Bookings provides an easy way to schedule and manage appointments through a web-based booking system. The Bookings calendar can integrate with Staff Member's Outlook calendar in order to streamline their availability. Bookings can also be integrated and viewed in Microsoft Teams.

Get Access to Bookings

Only Office 365 A3 (or greater – faculty, Staff & Students should have A5 licenses now) licenses have access to Microsoft Bookings. Office 365 A1 licenses do not have access to Bookings. Most faculty and staff should have A3 or A5 licenses, but some may not. If you do not have access to the Bookings app, please contact the Software and Application Support (SAS) or EIT.

How to set up a new booking calendar

Accessing a New Booking Form

1. Navigate to <https://www.office.com>
2. Sign in with your @smu.ca email address and password
3. On the left navigation bar, select the **All apps** button at the bottom left corner
4. **Find** and **select** the **Bookings** icon. If you do not see the Bookings icon, click on All apps and type **Bookings** in the search box. If still does not show up, please contact EIT or SAS to check your Office 365 license.

Creating a New Booking Form

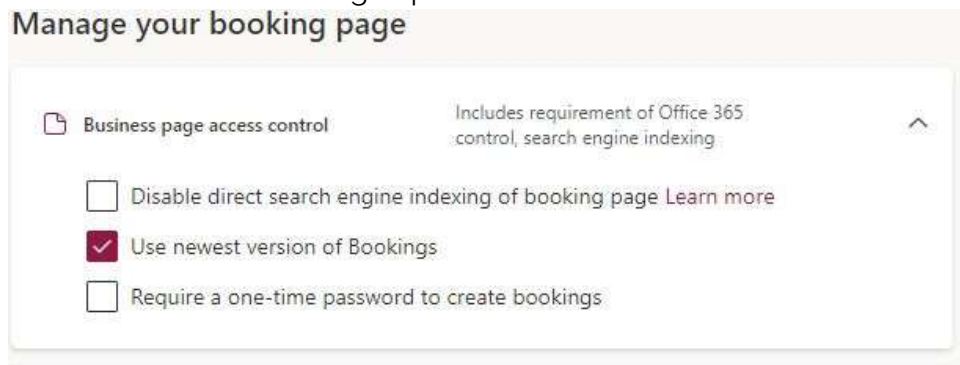
1. Once you select the Bookings icon from the Office Home Page, a new tab will open in your browser. Click on the **Get it now** button in the new tab.
2. A pop-out window will appear. Select **Add a booking calendar**.
3. Fill in the **Business name** text box with the desired title of your **Bookings calendar** (for example, Professor Carlton's Office Hours). In the Business type text box, start typing Universities and select **Colleges & Universities** from the drop-down menu.
4. Click on **Continue**. Once the new **Bookings calendar** is created, you will get an email notifying you that the calendar is ready (it may take a few minutes to load and for the email to send, please leave the browser and tab open while you wait).

5. We recommend using the **New Bookings Experience**. To enable this option, toggle on the **Try the new Bookings** button at the top-right corner of the screen

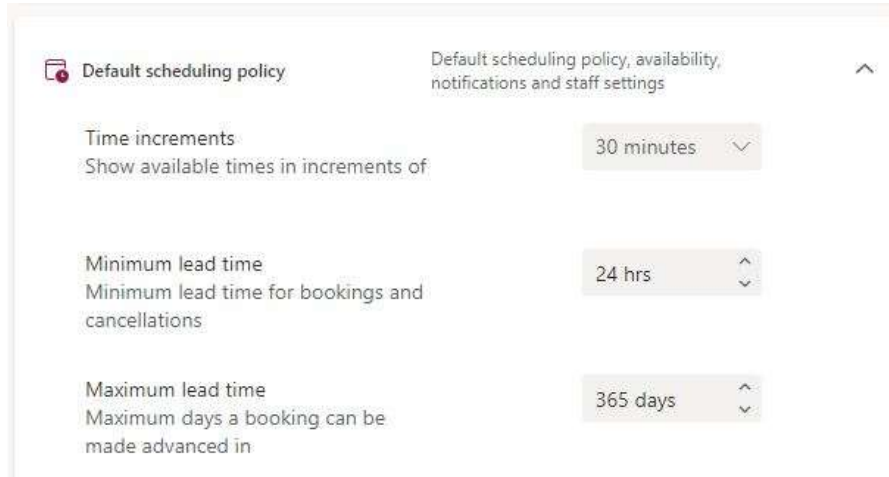


Setup a New Booking Page

1. Now that you are all set with a new Bookings calendar, click **Settings** on left navigation bar and you will be able to manage your **booking page**.
2. Under **Business page access control**, please make sure the **use newest version of Bookings** box is checked. There is also an option to **require a one-time password to create bookings** that can be selected according to preferences.



3. **Customer data usage consent** can be used to select whether users see a message and choose whether you can collect their data.
4. From the **Booking page**, click on the **Default scheduling policy** drop down menu and select the Time increments that you would like appointments to be scheduled for from the drop-down menu. (You can also select **Minimum** and **Maximum** lead times for bookings and cancellations by editing the numbers on the relevant boxes.



Default scheduling policy, availability, notifications and staff settings

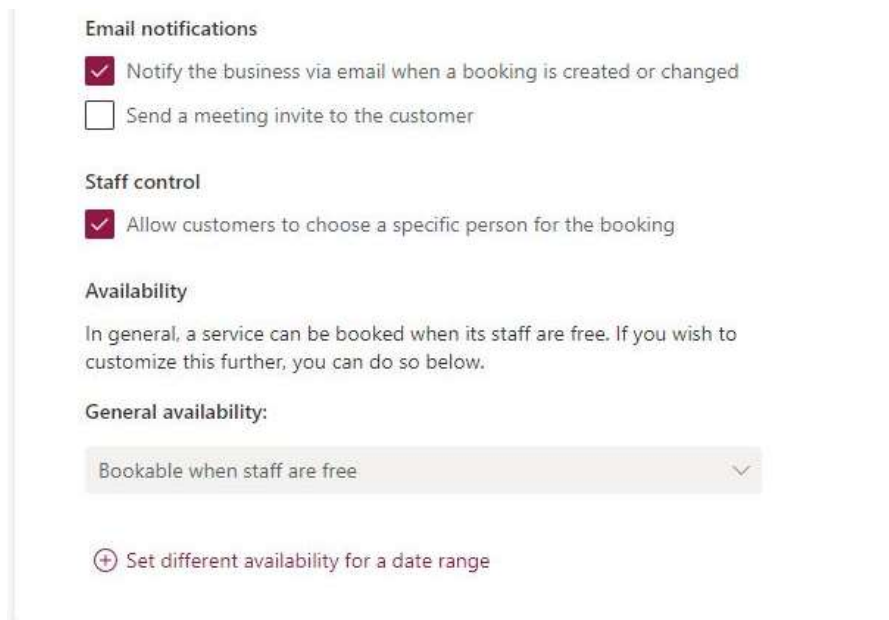
Default scheduling policy

Time increments
Show available times in increments of: 30 minutes

Minimum lead time
Minimum lead time for bookings and cancellations: 24 hrs

Maximum lead time
Maximum days a booking can be made advanced in: 365 days

5. If you would like to automatically have a meeting invitation sent to individuals for their Bookings appointment, select the **Send a meeting invite to the customer** under **Email notifications**. For the **Staff control** option, this allows individuals to book appointments for services where there are more than one staff member to choose from



Email notifications

Notify the business via email when a booking is created or changed

Send a meeting invite to the customer

Staff control

Allow customers to choose a specific person for the booking

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.

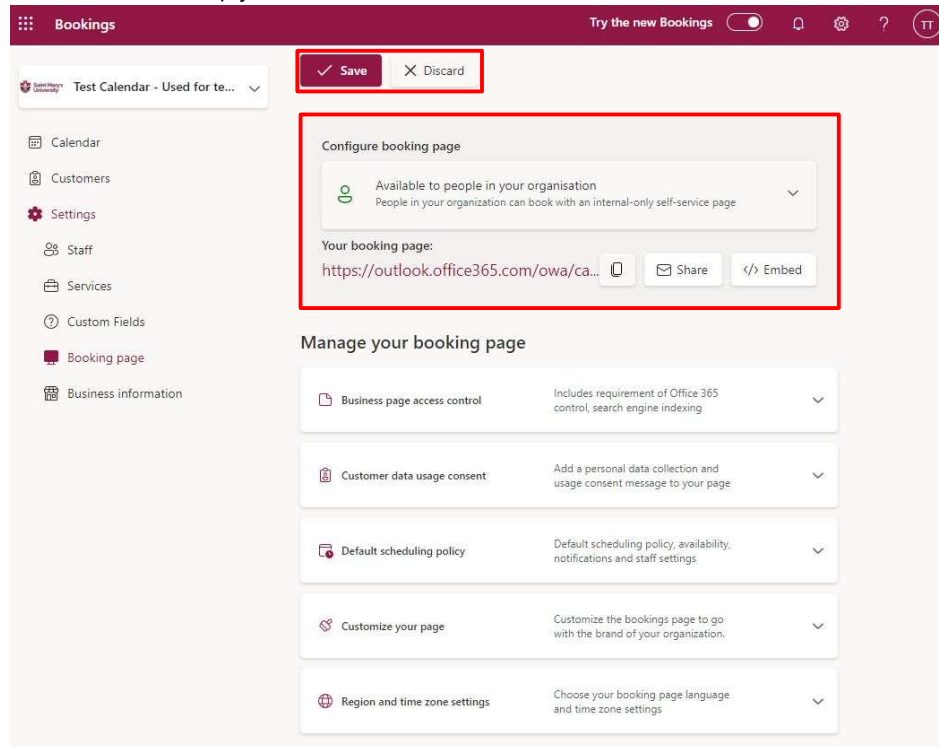
General availability:

Bookable when staff are free

[+ Set different availability for a date range](#)

How to save and share link of the Booking page

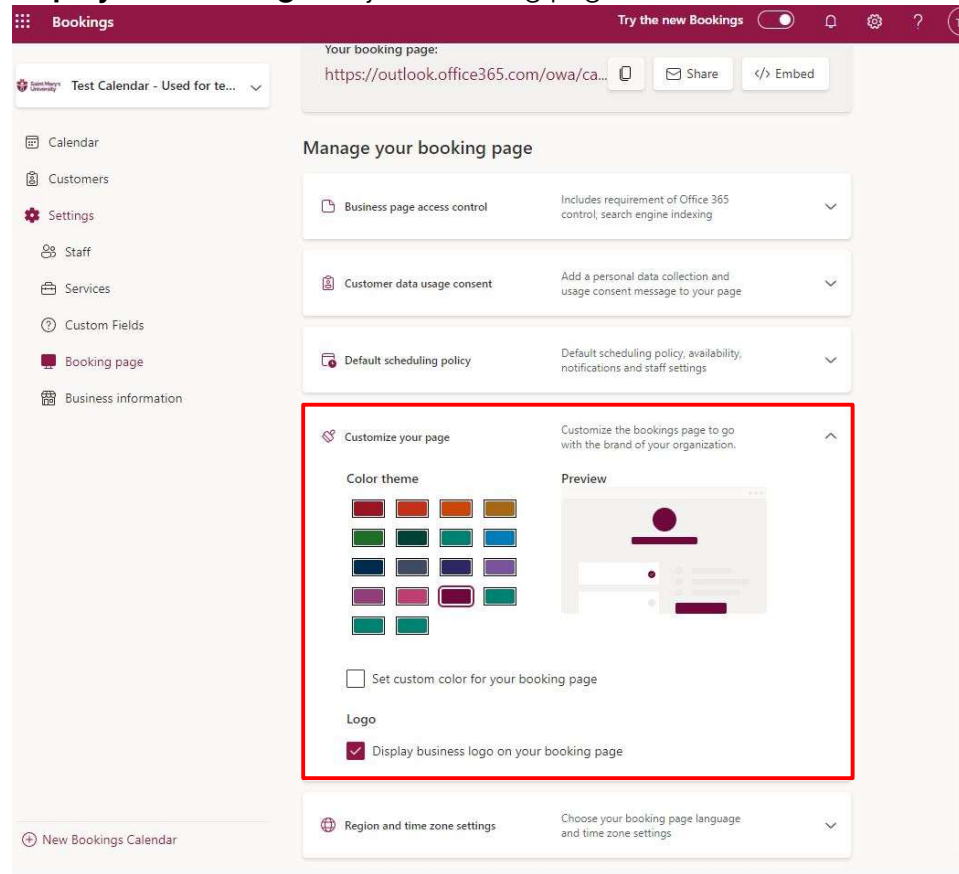
After everything is set up in the **Booking page**, please select **save** at the top of the screen to make sure any/all changes are being saved. Once everything is saved and ready to go, you can find the link to the Booking page you just created and will be able to share or embed or copy the link and share it.



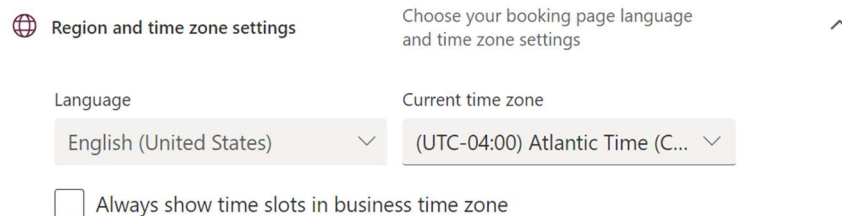
How to view your Booking page

You can click on the **link** provided under **Your booking page** to view your booking page in a new tab.

Customize your page allows you to choose a **color theme** (can also be customized by checking the **set custom color box** and **display business logo** on your booking page.



Region and time zone settings allows to set the **language** and **current time zone** of the calendar. You can also force the calendar to show attendees the business time zone instead of the time zone where the attendee is located



Next, we want to set up the basic information of the Bookings Calendar. This can be found under the **Business Information** tab of the **Settings**

Business Information

- **Basic Details** – Basic details allows you to write the name of your business, address, phone number, email address for customer replies, website URL, privacy URL, terms and condition URL, currency, and the business type.

☰ Basic details
Includes business name, address, phone, links and other basic details
^

Business name	Business address
<input type="text" value="Test Calendar - Used for testing"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="AT 107"/> ✕
Business phone	Send customer replies to
<input type="text" value="902-496-8168"/>	<input type="text" value="Justin.Nagle@smu.ca"/>
Website URL	Currency
<input type="text" value="http://smu.ca/"/>	<input type="text" value="CAD (\$)"/> ▼
Business type	
<input type="text" value="Education"/> ▼	

- **Privacy policy and Terms and conditions** tab allows you to link to the URL where these resources are kept – this is typically not used at SMU
- **Business Logo** – Here you can enter your department's logo or enter the New SMU logo, found [here](#)
- **Business Hours**
 - Enter the general availability for the business hours – or your general availability. You can also click the **+** button next to the day of interest to add split shifts

🕒 Business hours Enter information about your business hours ^

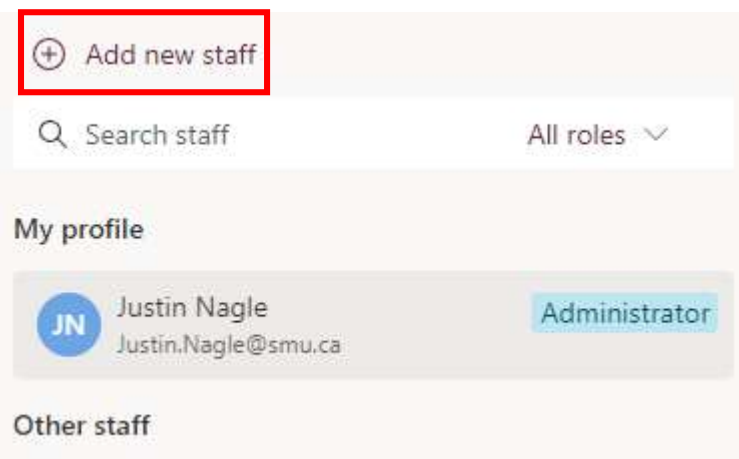
Monday	9:00 AM	5:00 PM	🗑️	+
Tuesday	9:00 AM	5:00 PM	🗑️	+
Wednesday	9:00 AM	12:00 PM	🗑️	
	2:00 PM	5:00 PM	🗑️	+
Thursday	9:00 AM	5:00 PM	🗑️	+
Friday	9:00 AM	5:00 PM	🗑️	+
Saturday	Day off			+
Sunday	Day off			+

When you are finished entering all the **Business Information**, click the **Save** button at the top of the page

The next thing to do after setting up the Business Information and Booking Page is to set up which staff members will be bookable through the Bookings Calendar. Go to Settings, then select the Staff tab

Staff Tab


To add new staff to the Bookings Calendar, click **Add new staff**



⊕ Add new staff

🔍 Search staff All roles ▾

My profile

 Justin Nagle Administrator
Justin.Nagle@smu.ca

Other staff

A new window will open. Here you can search for the person you want to add (using @smu.ca email address), their role (see descriptions below), set the colour you want them to appear as, edit their availability, etc. Click on **Save changes** when complete





Add staff



JH Jen Husky ×

Initials ✓ Green Light ▼

 sasdemo1@smu.ca  Phone number

 **Team member**
 Team members can manage bookings on their own calendar and their availability in the booking mailbox. When adding or editing a booking in their calendar, they'll be assigned as staff. ▼

Notify the staff member via email when a booking assigned to them is created or changed

Availability

Setup availability and meeting hours for the staff member. [Learn more](#)

Events on Office calendar affect availability
 Please note, personal calendar availability will not be accounted for in multi-day services.

Use business hours

Turn off business hours to edit availability

Monday	9:00 AM	▼	5:00 PM	▼		
Tuesday	9:00 AM	▼	5:00 PM	▼		
Wednesday	Closed					
Thursday	9:00 AM	▼	5:00 PM	▼		
Friday	9:00 AM	▼	5:00 PM	▼		
Saturday	Closed					
Sunday						

Discard

Save changes

- **Role Descriptions:**

- Administrator

- Administrators can edit all settings, add and remove staff, and create, edit and delete bookings

- Scheduler

- Schedulers can manage bookings on the calendar. They have read-only access to settings, staff, and services

- Team member

- Members can manage bookings on their own calendar and their availability in the booking mailbox. When adding or editing a booking in their calendar, they'll be assigned as staff

- Viewer

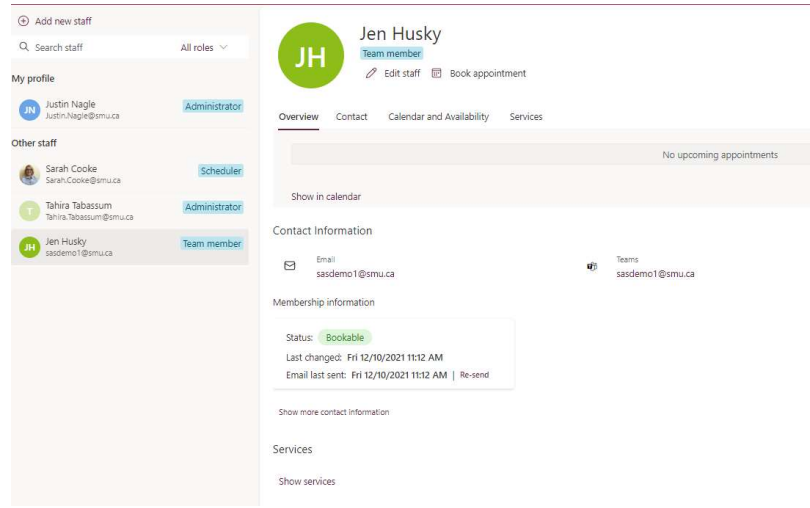
- Viewers can see all the bookings on the calendar. They cannot modify or delete them. They have read-only access to settings

- Guest

- Guests can be assigned to bookings but they can't open the booking mailbox

Once Staff have been added, you can view and edit their details from the **Staff tab** in Settings as well as Book an appointment for them. You can view their profile, by selecting the staff member of interest:

- Overview tab – consists of upcoming appointments, contact info, and services they can be booked for
- Contact tab – shows contact information
- Calendar and Availability tab – shows their availability and appointments
- Services tab – shows which services they can be booked for

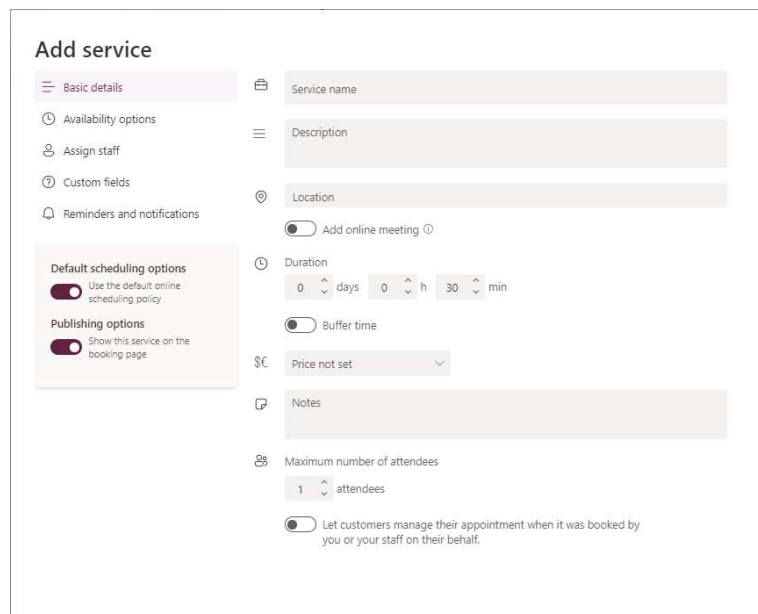


The screenshot shows a user interface for managing staff. On the left, there is a sidebar with a search bar and a list of staff members under 'Other staff'. The main content area displays the profile for 'Jen Husky', who is a 'Team member'. The profile includes tabs for 'Overview', 'Contact', 'Calendar and Availability', and 'Services'. The 'Overview' tab is active, showing 'No upcoming appointments' and a 'Show in calendar' button. Below this, there is a 'Contact Information' section with email and Teams details, a 'Membership information' section showing 'Status: Bookable' and 'Last changed: Fri 12/10/2021 11:12 AM', and a 'Services' section with a 'Show services' button.

Once staff have been added to the Bookings Calendar, it is time to create different Services. Services (in the case for SMU) are the same as appointments. Here you can add multiple different services (i.e. 1 hour consult, Office Hours, 3-hour exam help session, 15-minute quick help, etc.)

Services

From the left navigation bar, under **Settings**, click on **Services**. Now, there is an option to **search** for services as well as **add a new service**. Click on **add a new service** and a window will pop up.



The screenshot shows the 'Add service' form. On the left, there is a sidebar with navigation options: 'Basic details', 'Availability options', 'Assign staff', 'Custom fields', and 'Reminders and notifications'. The 'Basic details' section is expanded, showing 'Default scheduling options' (with a toggle for 'Use the default online scheduling policy'), 'Publishing options' (with a toggle for 'Show this service on the booking page'), and 'Service name', 'Description', 'Location', 'Add online meeting' (toggle), 'Duration' (0 days, 0 h, 30 min), 'Buffer time' (toggle), 'Price not set' (dropdown), 'Notes', 'Maximum number of attendees' (1 attendees), and 'Let customers manage their appointment when it was booked by you or your staff on their behalf.' (toggle).

Basic Details

In the **basic detail** section, you will first create a **service name** for the service you are creating. This will later appear in the drop-down menu on the calendar page. Add a **description** which explains what this service is about. Finally, you can add a **Location** if needed.

Add online meeting, this button will enable or disable online Teams meetings for every appointment.

When enabled, a link will be added to the bookings calendar event on both the user's calendar and the Staff member's calendar.

Duration can be used to set up the length of the meeting (i.e. 30 minute or 60 minute slots). We recommend enabling **buffer time**, this allows the staff member to block some extra time at the end of the meeting. For example, if you set an hour-long appointment that ended at 1:00pm, and you set a 10-minute buffer time to gather your thoughts and prepare for the next meeting. The staff member's calendar would show as busy and non-bookable until 1:10pm.

Price not set – Not used at Saint Mary's University

Maximum number of attendees can be changed to 1 or more. This setting allows multiple users to book a particular appointment at the same time. The recommended setting for Saint Mary's is 1 (i.e. 1 student per meeting).

Let the customer manage their booking, meaning if the Booking's calendar admin or a staff member manually books an appointment for someone (i.e. a student) the student is able to manage their booking (i.e. change meeting time, cancel, etc.). It is recommended to enable this option.

Availability Options

Here you can set the time increments of the appointment (i.e. I only want students to schedule 30 minutes appointments with me).

You can also set the minimum and maximum lead time (how soon/far in advance can a student schedule an appointment with me). It is suggested to lower the Maximum Lead time to 2 weeks (you don't want a student in the Fall semester booking an appointment with you in the summer term). Make sure to toggle off **Default scheduling options** if you want to change the lead times.

Leave all other options as default.

Add service

- ☰ Basic details
- 🕒 Availability options
- 👤 Assign staff
- ❓ Custom fields
- 🔔 Reminders and notifications

Default scheduling options

Use the default online scheduling policy

Publishing options

Show this service on the booking page

Scheduling policy From default scheduling options

Settings for when customers can book services

Time increments
Show available times in increments of

Minimum lead time
Minimum lead time for bookings and cancellations

Maximum lead time
Maximum days a booking can be made advanced in

Availability From default scheduling options

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:

Assign Staff

Here you can assign certain staff members to a service. For example, in a lab help session you can add all the TA's to be bookable. In the case of office hours, it would only be the instructor that is bookable.

Add service

- ☰ Basic details
- 🕒 Availability options
- 👤 Assign staff
- ❓ Custom fields
- 🔔 Reminders and notifications

Default scheduling options

Use the default online scheduling policy

Publishing options

Show this service on the booking page

Assign staff to the service

Allow customers to choose a particular staff for booking

- JH Jen Husky
- JN Justin Nagle
- Sarah Cooke
- TT Tahira Tabassum

Custom Fields

Custom fields allow you to collect additional information from the user that signs up for the service (i.e. what do you need help with? What form needs to be signed). You can make this question required or optional.

Add service

- Basic details
- Availability options
- Assign staff
- Custom fields**
- Reminders and notifications

Customer information

- Customer email Required
- Phone number Required
- Customer address Required
- Customer notes Required

Default scheduling options

Use the default online scheduling policy

Publishing options

Show this service on the booking page

Custom fields

1 required and 0 optional custom fields selected.

Selected Required ↑ ↓

What do you want to learn in Brightspace

Select Required ↑ ↓

What is your level of expertise in the software

- Beginner
- Moderate User
- Advanced User
- Power User

Reminders and Notifications

Here you can customize the reminders and notifications for your service. You can customize reminder emails, additional information for confirmation emails, etc.

Add service

- ☰ Basic details
- 🕒 Availability options
- 👤 Assign staff
- ❓ Custom fields
- 🔔 Reminders and notifications

Default scheduling options

Use the default online scheduling policy


Publishing options

Show this service on the booking page

Email and SMS notifications

- 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
- Enable text message notifications for your customer

Additional information for email confirmation



Add additional information and links that your customers will receive in their email confirmation

Reminders and confirmations

⊕ Add an email reminder

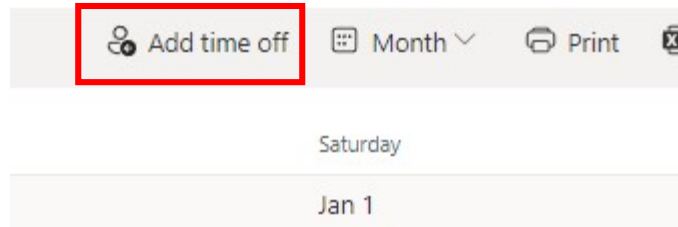
1 day before: ✎ 🗑

Just a quick reminder that your service is coming up soon.

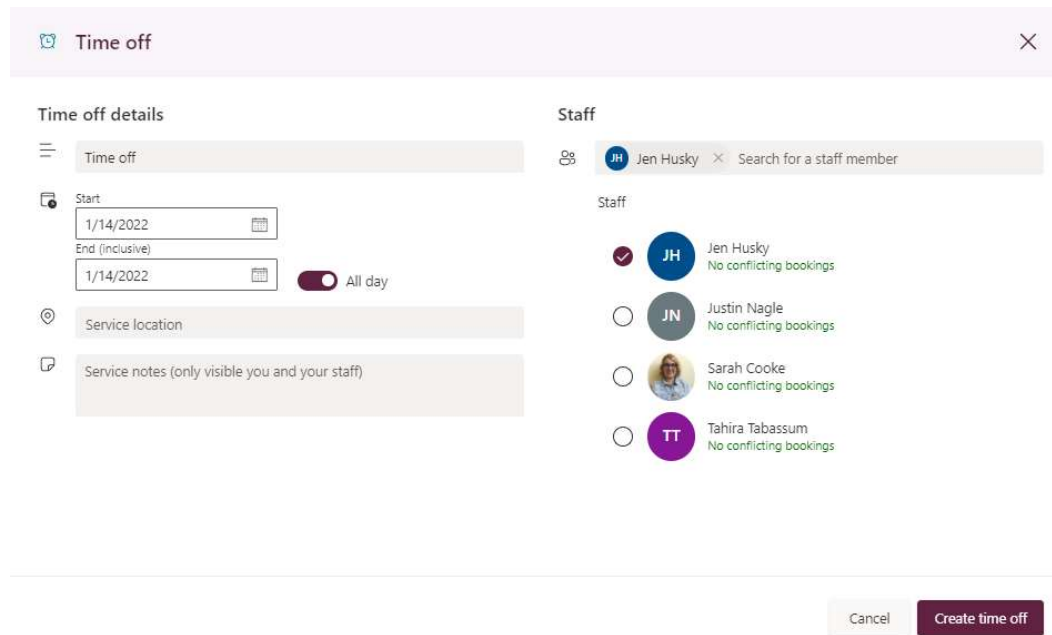
To the right of the service window, there will be a similar layout of options as in Staff Overview discussed earlier. After all the changes have been made, make sure to **Save changes** before closing the window.

Add time off for individual staff members and schedule holiday closures

Under the Calendar tab, select the **Add time off** button to add time off for specific staff members.



A new window will open. Set the time off for the staff member and remember to select the relevant staff member. Click **Create time off**



If you want to schedule a closure, repeat the above steps but select all staff.

How to delete a booking calendar

Email EIT (helpdesk@smu.ca) with the **Bookings Calendar name** indicating that you would like the calendar deleted

Use Bookings in Teams

The Microsoft Bookings app for Teams is only available in the desktop version of the Teams app.

To add the Bookings app in Teams, click the **Apps button** on the bottom left-hand side and search for Bookings and click **Add**

Once added to Teams, you will also be able to access another tab called Bookings in the Teams calendar to view Bookings information

Bookings Calendar in Teams

If this is your first time using the Bookings app for Teams, click the ... on the left-hand side and search for and select **Bookings**. Then click **Get started**

You can create a New Bookings calendar in Teams, or access an existing calendar. Setting up a New bookings calendar is similar to the steps above, although you do not get access to as many settings. To select an existing bookings calendar, select the bottom button, then search for the name of your Bookings calendar hit enter and select the pop-up name of your Bookings Calendar. Then click **Done**

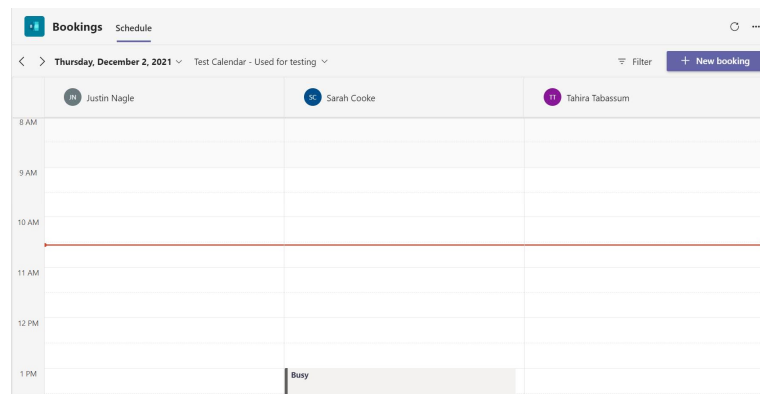
Note: all Bookings calendars are searchable in the Saint Mary's organization, but you will only have access to the ones that you are a Viewer/Team member/Scheduler/Admin of

Add a booking calendar

New booking calendar

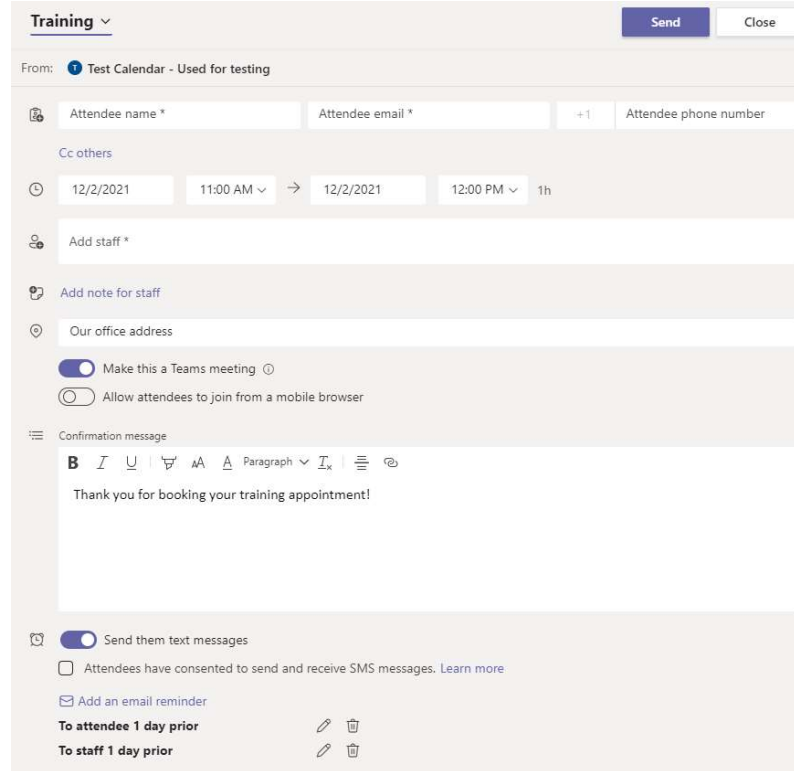
Existing booking calendar

The Bookings calendar in Teams will show you the schedule of your staff on a day-by-day view




You can click the date to bring up the calendar and select another date to view staff members' availability. You can also schedule a New booking by clicking the **+New booking** button. This will provide you

with a variety of options, similar to the manually booking an appointment in the above sections




The screenshot shows a 'Training' booking form. At the top right, there are 'Send' and 'Close' buttons. The form is titled 'From: Test Calendar - Used for testing'. It includes fields for 'Attendee name *', 'Attendee email *', and 'Attendee phone number'. Below these is a 'Cc others' section with a date and time selector set to '12/2/2021' from '11:00 AM' to '12:00 PM' for a duration of '1h'. There are also fields for 'Add staff *' and 'Add note for staff'. A section for 'Our office address' is present, along with toggle switches for 'Make this a Teams meeting' (checked) and 'Allow attendees to join from a mobile browser' (unchecked). A 'Confirmation message' section contains a rich text editor with the text 'Thank you for booking your training appointment!'. At the bottom, there are options to 'Send them text messages' (checked), a checkbox for 'Attendees have consented to send and receive SMS messages. Learn more', and an 'Add an email reminder' section with two reminders: 'To attendee 1 day prior' and 'To staff 1 day prior', each with edit and delete icons.


Once all the fields are filled in, you can click the **Send** button at the top-right to schedule the Bookings appointment. A confirmation email will go out to Attendee and the Staff member with a link to the Teams meeting (if applicable)



Confirmed booking for
Sayan

Training with
Justin Nagle


Monday, December 6, 2021
11:00 AM - 12:00 PM
(UTC-04:00) Atlantic Time (Canada)


Our office address

[Join your appointment](#)
via Microsoft Teams


Additional Information
Thank you for booking your training appointment!


Have a conflict?
[Change your appointment](#)


If you need to manage settings of the Bookings calendar, it can be done in the Teams Bookings app. To access settings, click the **More options** button ... and select **Settings**

Settings ×

Test Calendar - Used for tes...

 Business details

 Appointment types

 Staff

Business details
Fields with * are required

Business or department name *

Business type *

Send attendee responses to

Business phone number

[Save](#)

The settings tab will allow you to make changes to the Business details, appointment types, and *add/edit/remove staff members

*depending on your role within the Bookings calendar

Note: the settings are limited in the app. To access all of the settings available, please use the web version of Bookings

Tips

- Use a good naming convention for your Booking site display name, do not name it the same as an individual. The page will be, by default, available in the global address list, and this could cause confusion. Make the name unique. For instance, the name of the class - 'Intro to Geological Processes 1201 – Fall 2022'
- Change the theme of your booking page to personalize it.
- Customize the notifications for your services
- The Bookings Calendar can see when you have meetings scheduled on your Outlook calendar and will not allow for appointments to be scheduled during other meetings. Be sure to select this setting when adding staff
- The Scheduling policy section on the Booking Page will set your default availability, but individual services can each have their own availability windows that override the default scheduling policy
- Add Buffer time if you need to allow for transit time between appointments, or if you would like time before the next appointment
- Set up more than one service to allow for appointment times of varying lengths.
- If you are holding your appointments in a shared resource location (e.g. a meeting room on campus), then create meetings with those resources in your Outlook before publishing your Bookings page. Bookings will not book meeting rooms for you; those have to be done in Outlook.
- Maximum number of attendees for an event is greyed out and set at 1. You can only change the maximum number of attendees when you create a new service from the Services page. Click on Add a service and the Maximum Attendees field should no longer be greyed out.