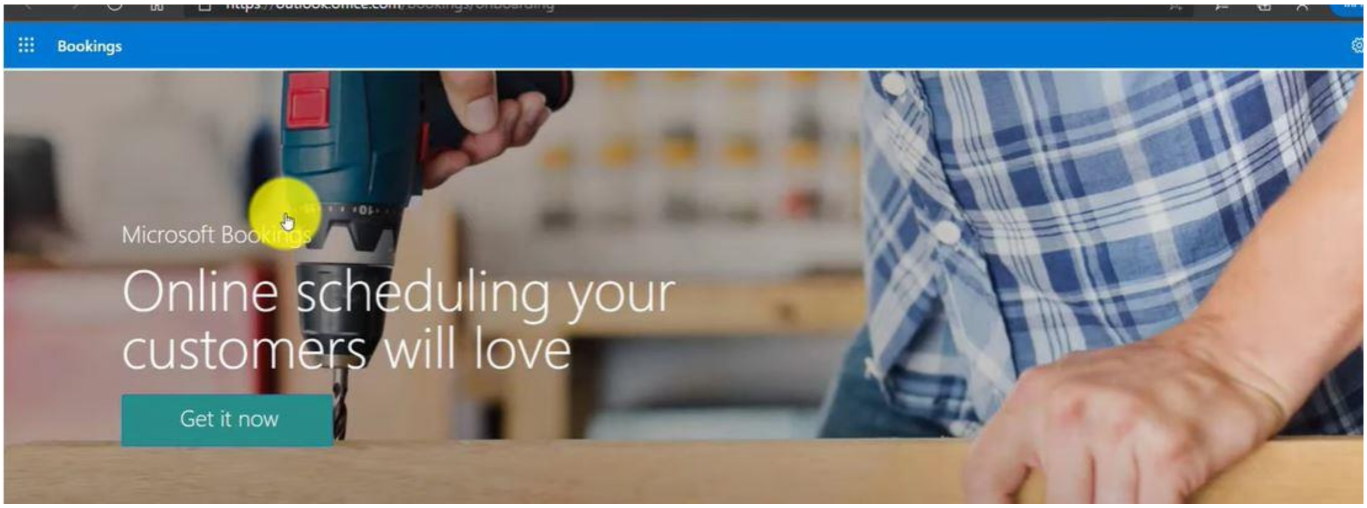
Using Microsoft Bookings for student advising appointments.

Bookings allows you to let students sign up for appointments at times in such a way that their appointments don't conflict with anything that is scheduled on your Outlook Calendar. It can be used to set up both physical and virtual meetings. You can use this for office hours, paper consultations, or other appointments.

This guide discusses using Bookings for advising appointments.

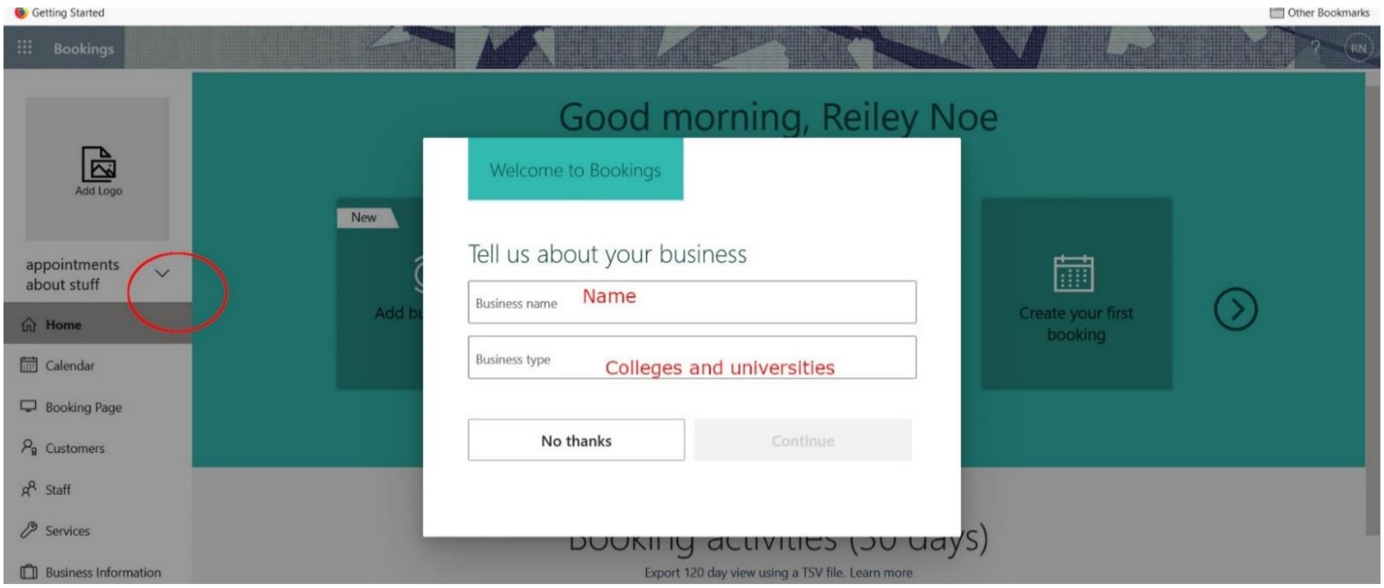
To get started

1. You can access bookings by clicking on the waffle icon in the upper right corner when you are in the web version of office 365 or your web version of Outlook. You'll see a menu open up with all the Office 365 applications appear. Click on Bookings. If you've never used Bookings before, click on the Get it Now button.

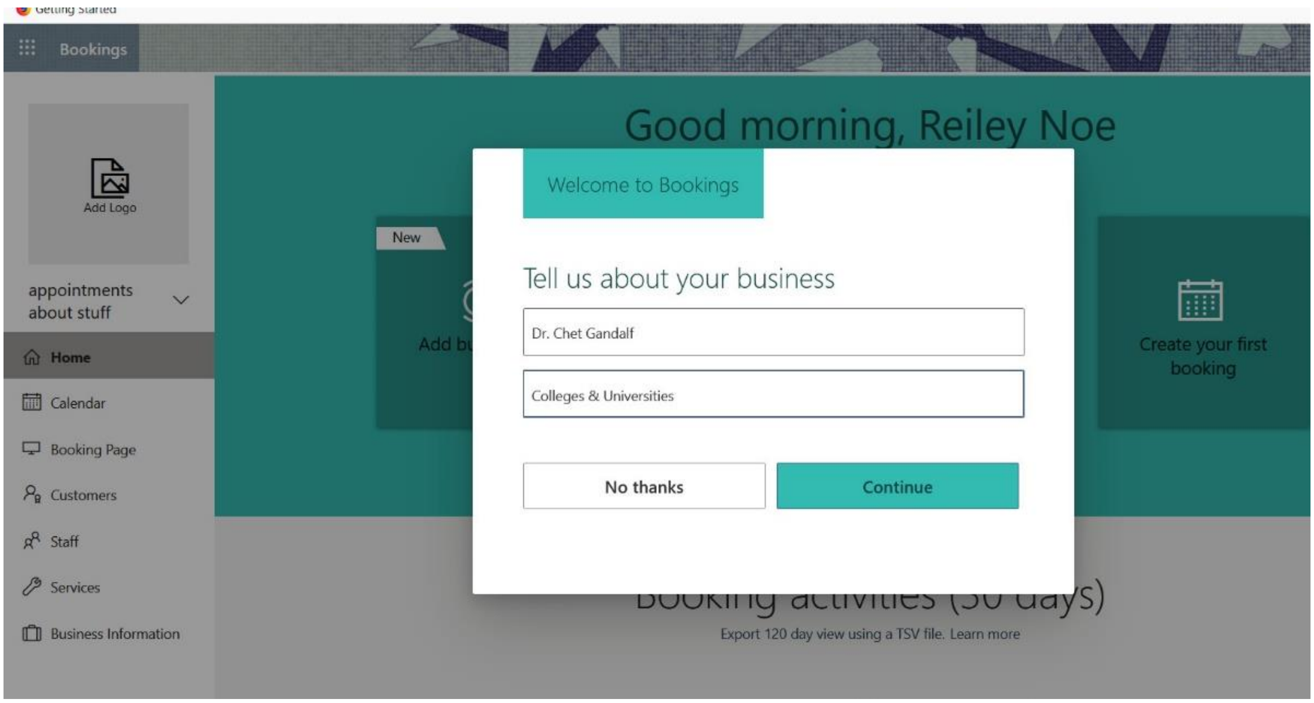


2. After you click Get It Now or if you have used Bookings before, you'll get the screen below. Click on the down arrow that is circled and then it will ask you to create a New Bookings 'business' or Open an old one. We are creating a new one here.

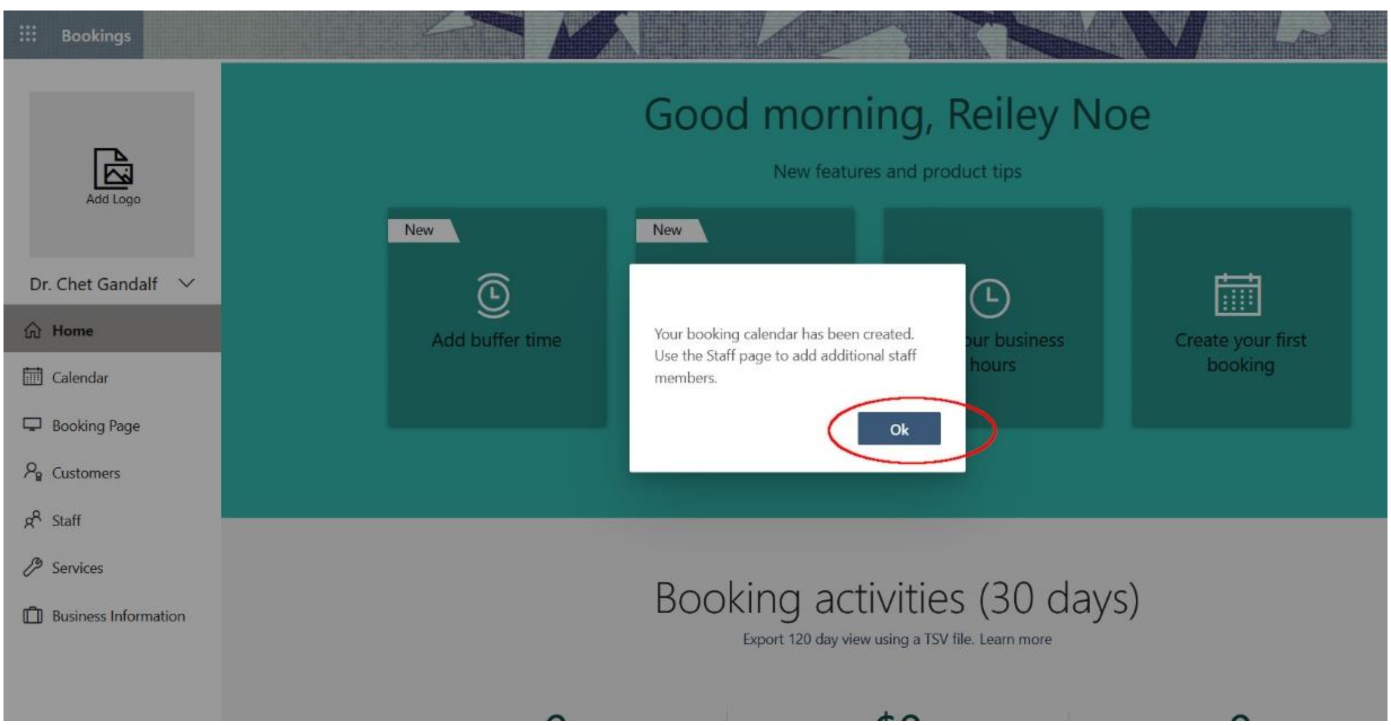
   Note that Bookings uses private sector terminology. Add your name as the Business Name. Add Colleges and Universities as the Business Type



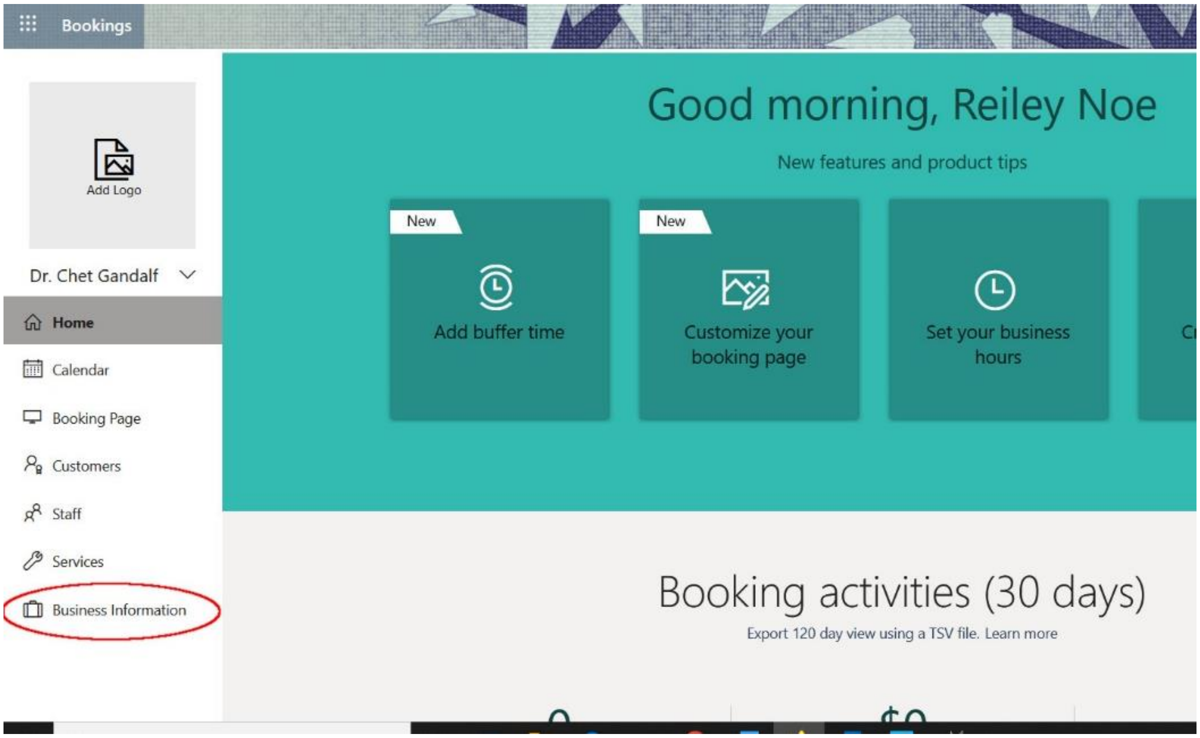
3. Click continue.



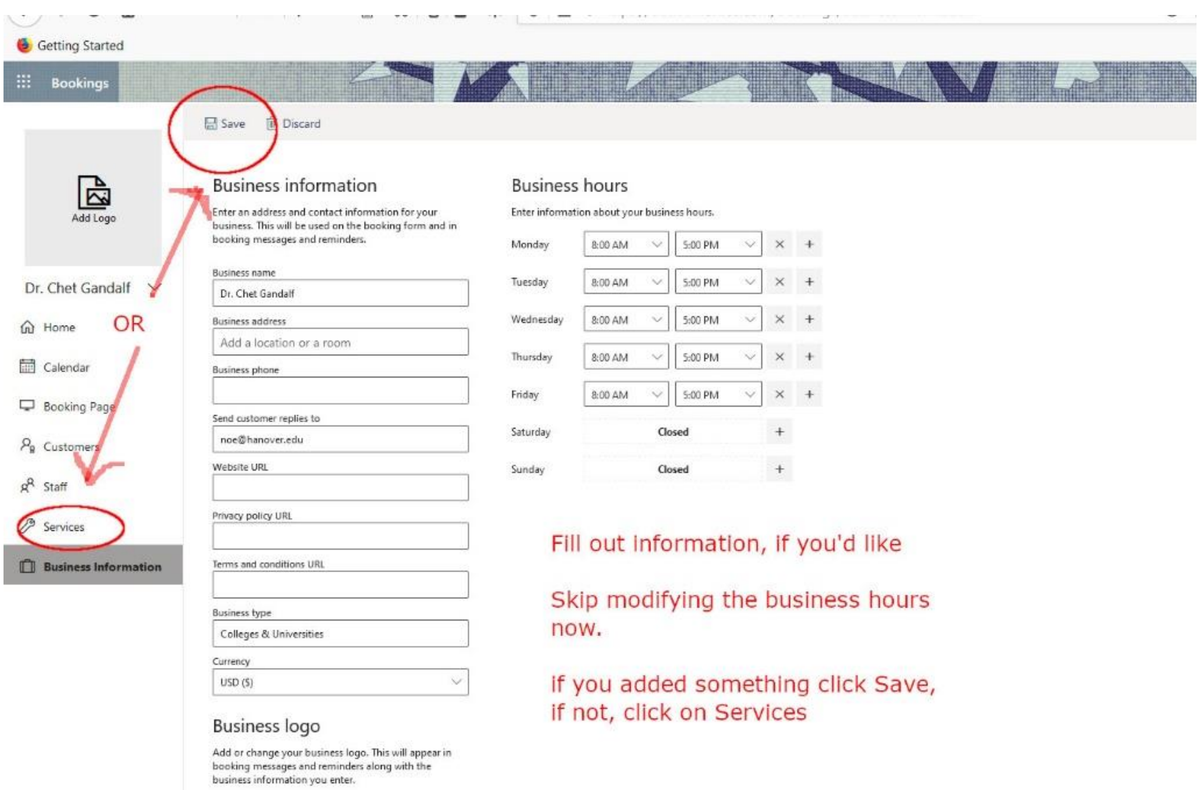
4. Click OK



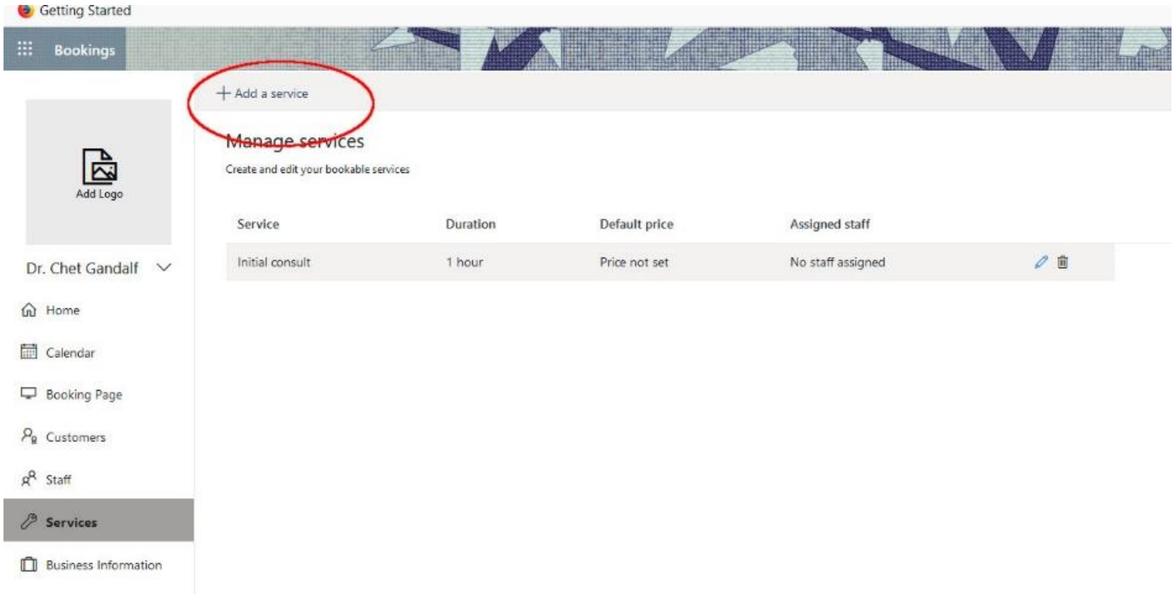
5. Go to Business information at the bottom of the column to the left.



6. Fill out the information, if you wish. It is not necessary. Skip adding business hours. If you've added nothing, go to Services. If you added some information, click Save then go to Services.

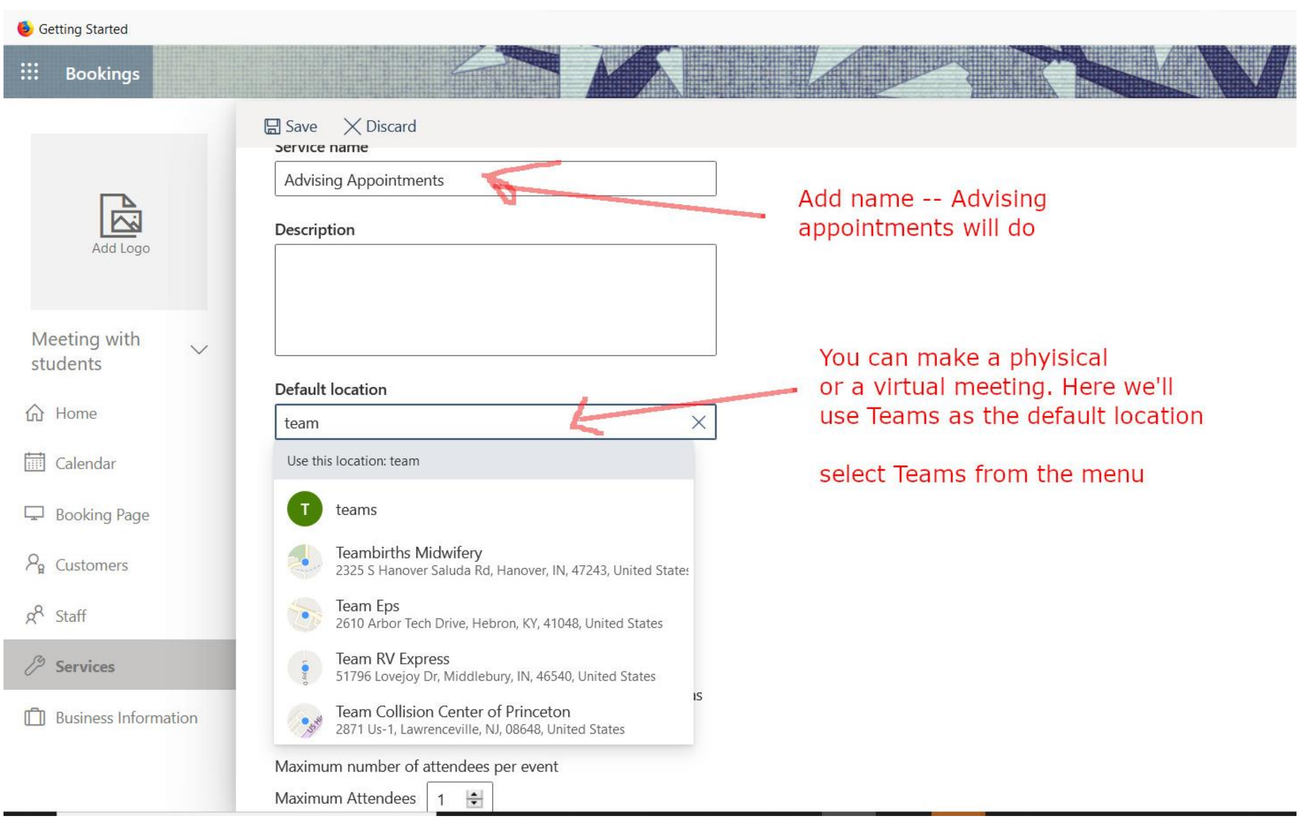


7. There is a default service listed, which we will ignore. Click Add a Service.

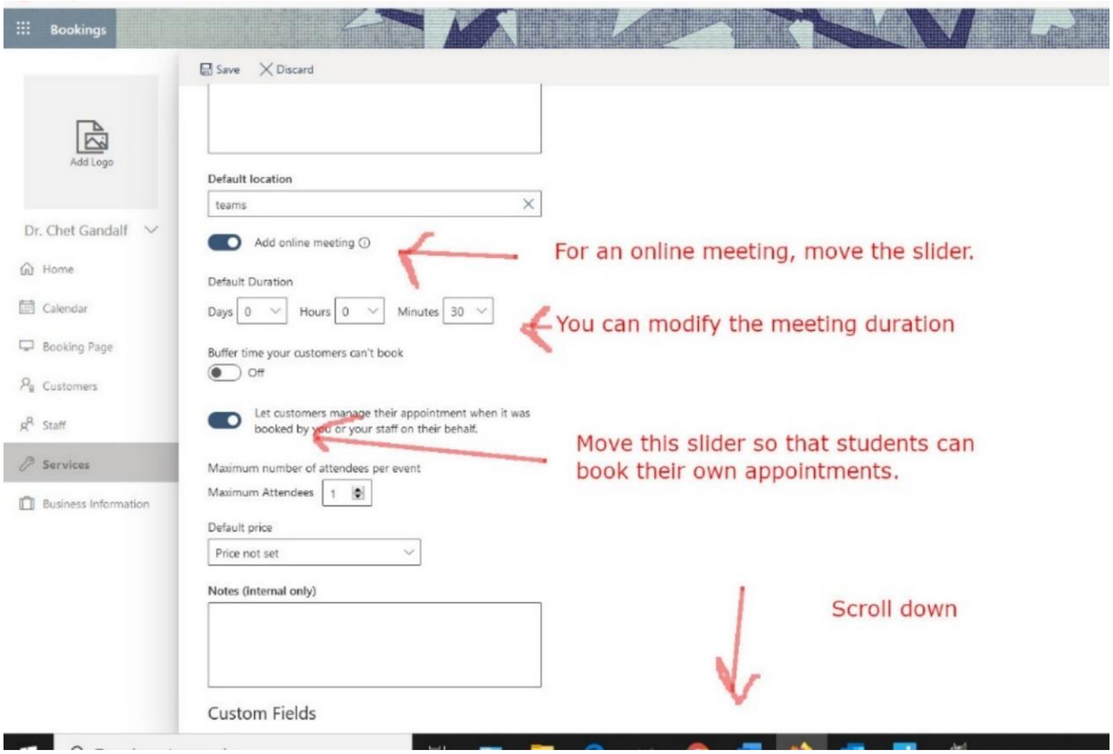


8. We'll name our service Office Hours, though you can use this for other meetings, like consultations for papers or meetings with groups who do group work. You can set up multiple services within Bookings to cover these different types of meetings.

   You can meet in a physical location or online. If you meet online via Teams, an invite will include a link to a Teams meeting.

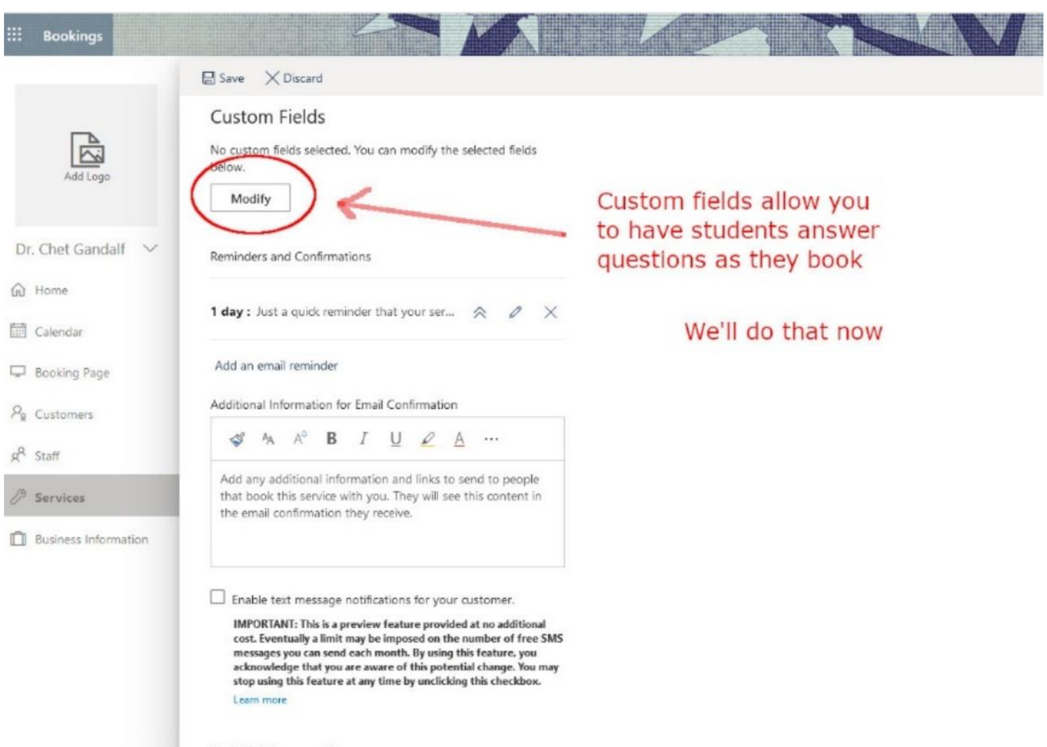


9. Tick the sliders described below:

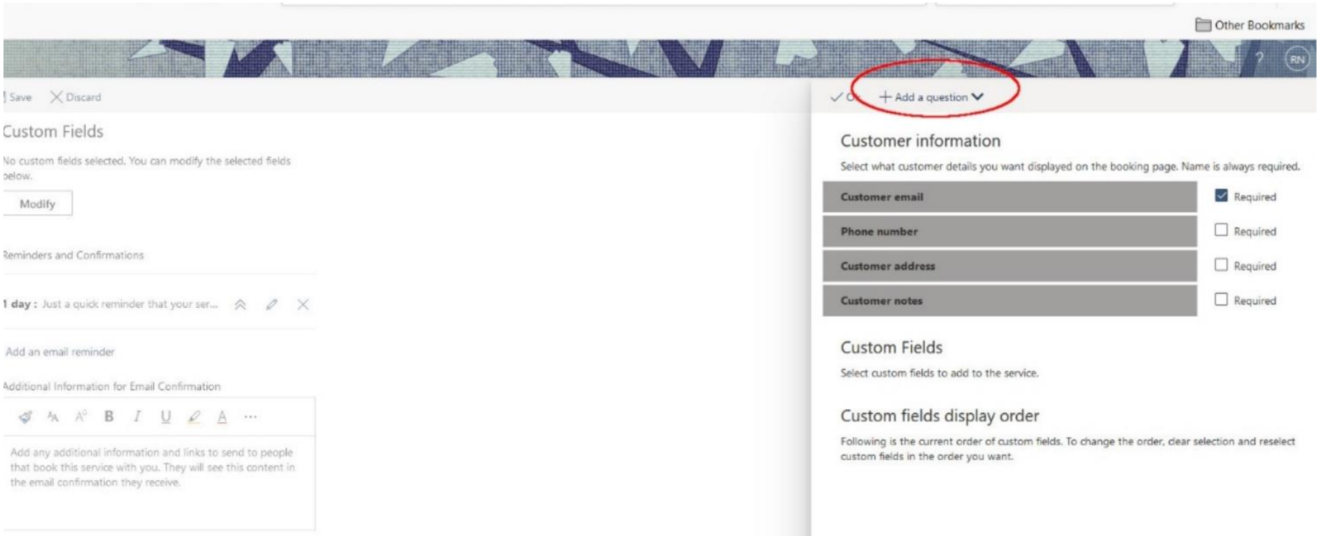


10. You can create custom fields in a Bookings invitation to get information from the student who is setting up the meeting. To create the custom fields, click the Modify button.

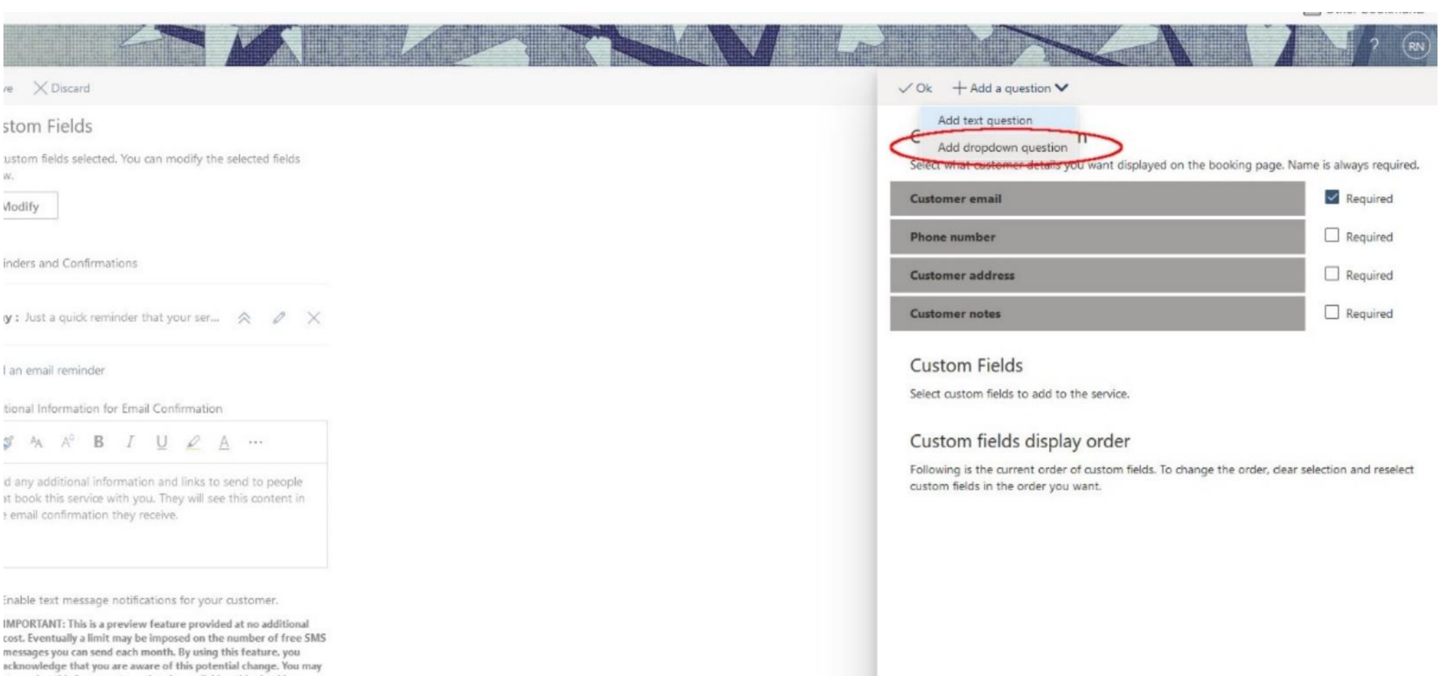
This is an optional setting. If you want to ask questions of students when they book an appointment, continue through steps 11-18. If you will not be asking them for information as they book an appointment, just skip to step 19.



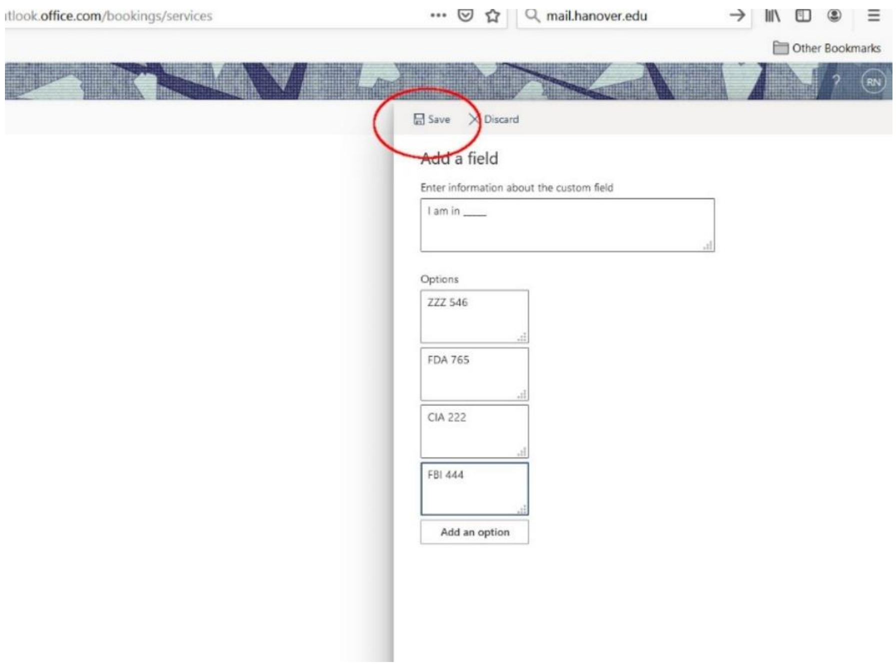
11. Click on Add a Question.



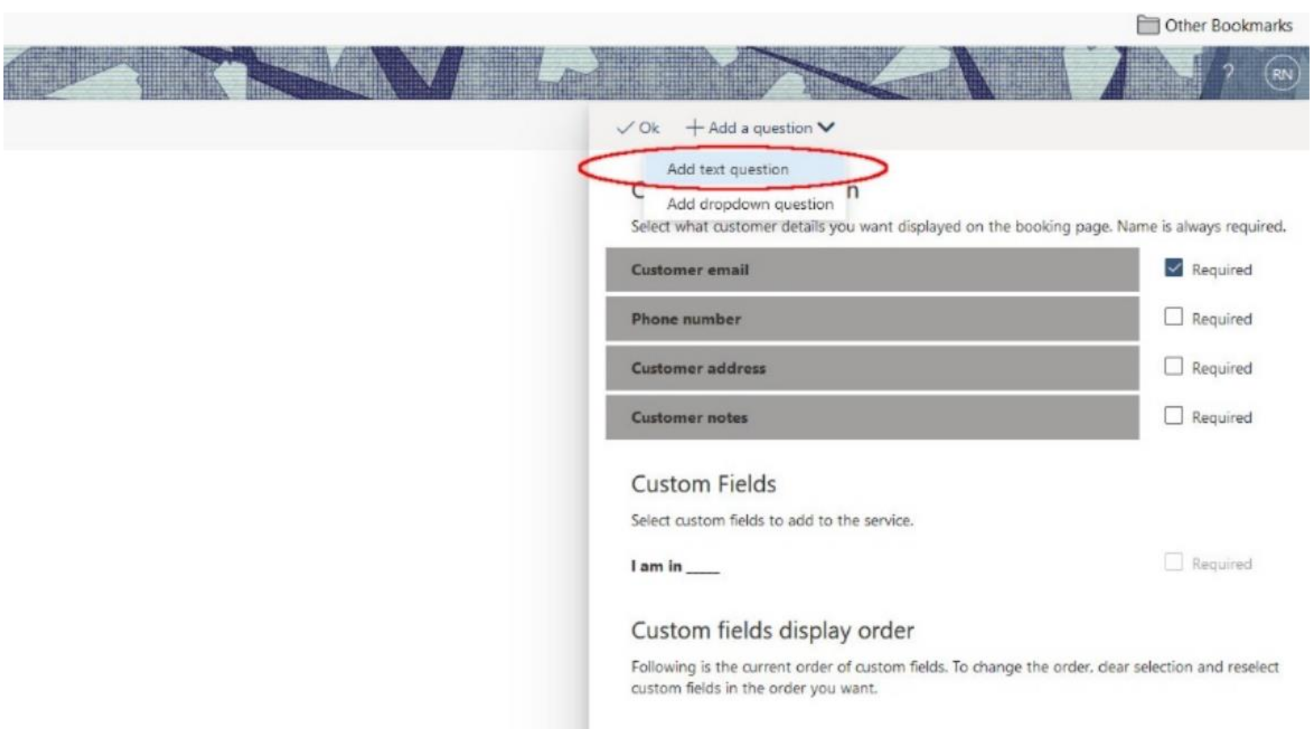
12. The drop down asks if you want to make a text question or a dropdown question. We'll look at the dropdown question first.



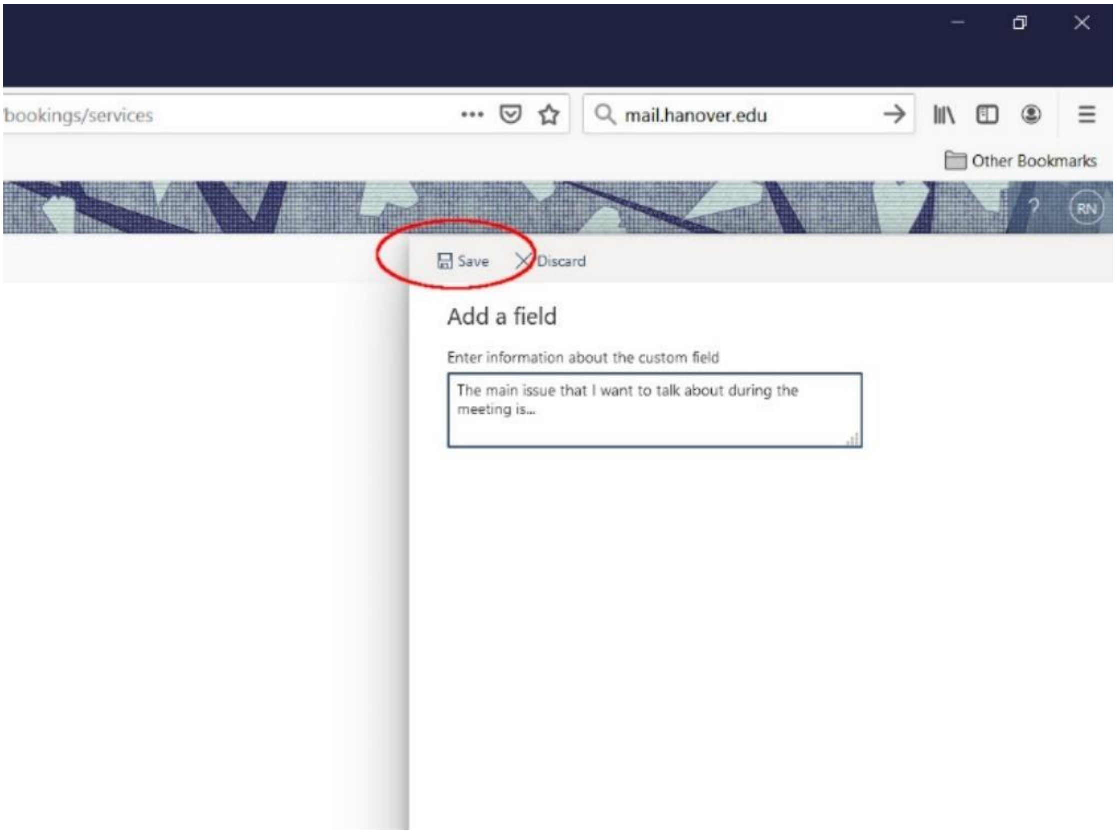
13. We'll add a drop-down question that asks the student which class they are in. Add the text and then click Save.



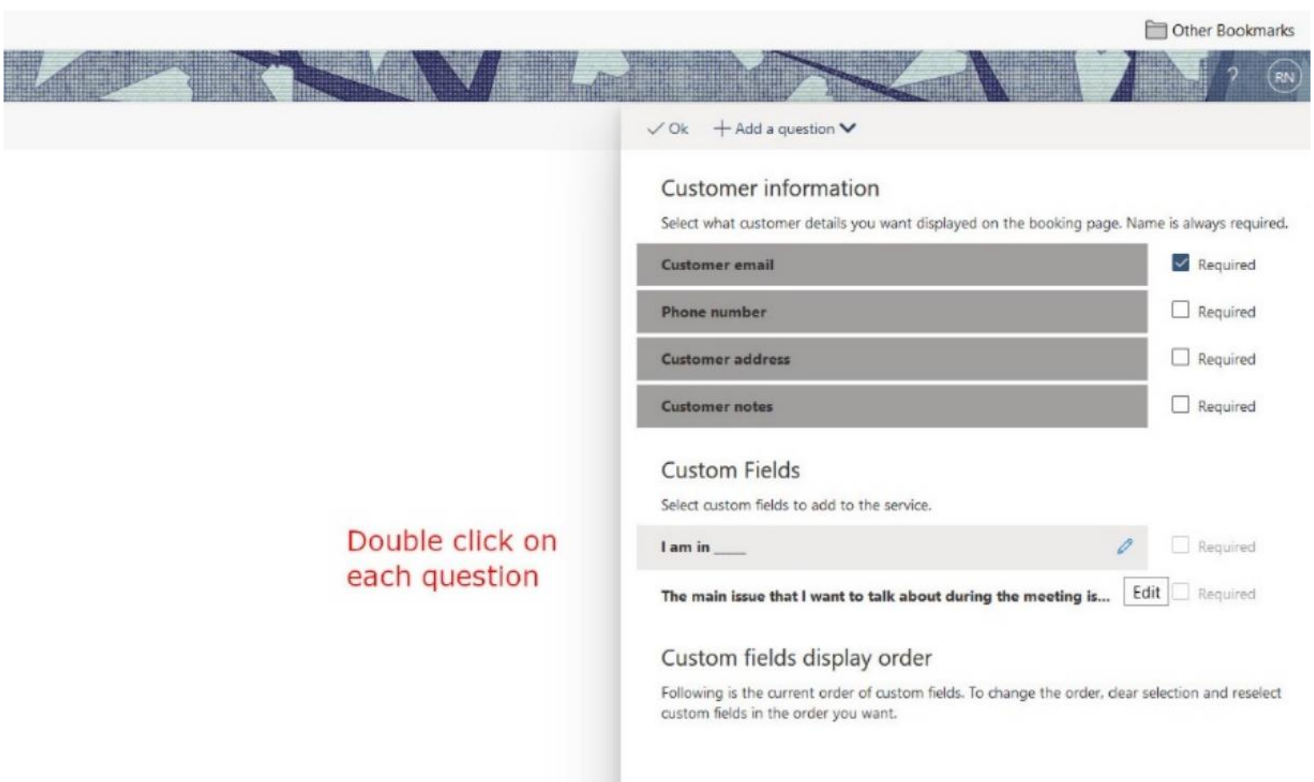
14. We will add a text question now. We'll pick that selection from the drop-down menu.



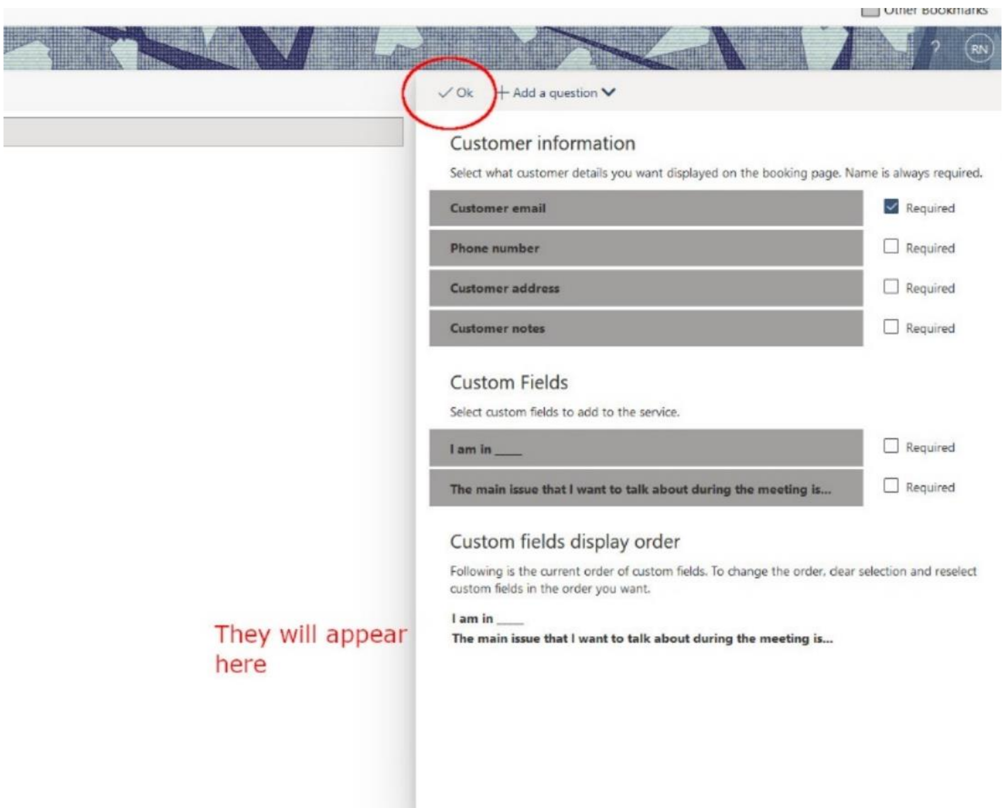
15. Add the text in the box and then click Save.



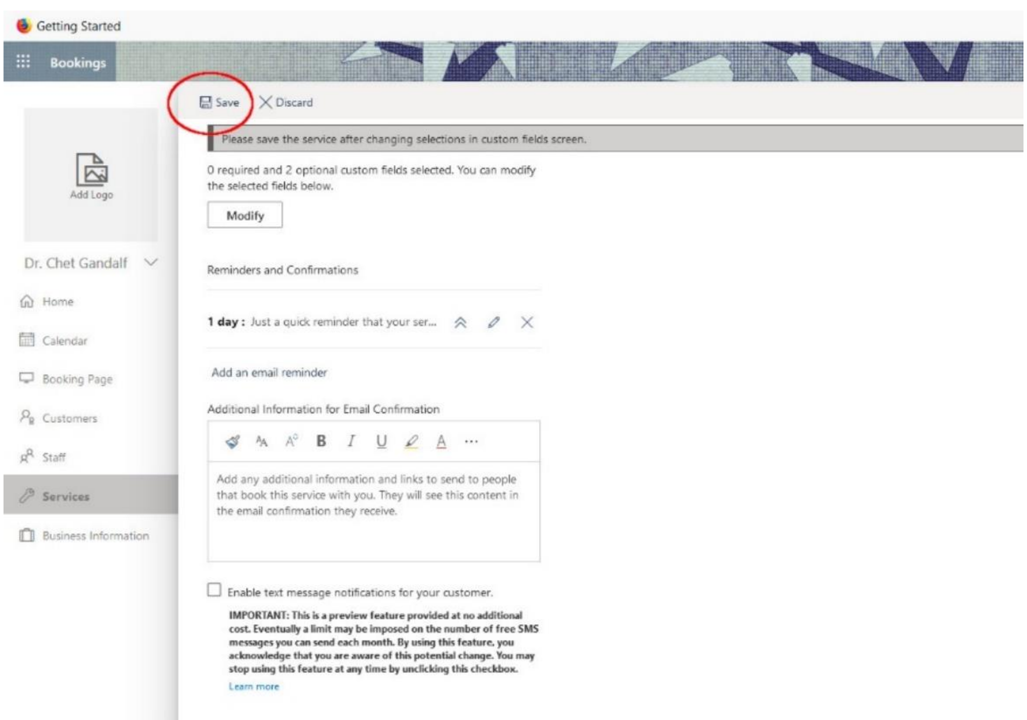
16. Double-click on each question to make them populate in the display order.



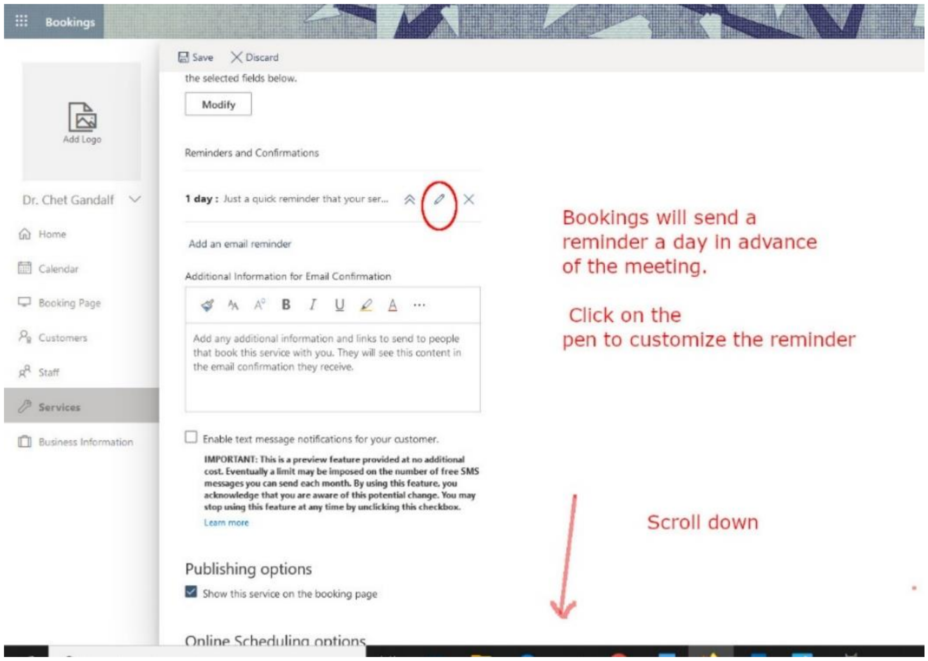
17. After they populate in the Custom Field Display Order area, click on OK.



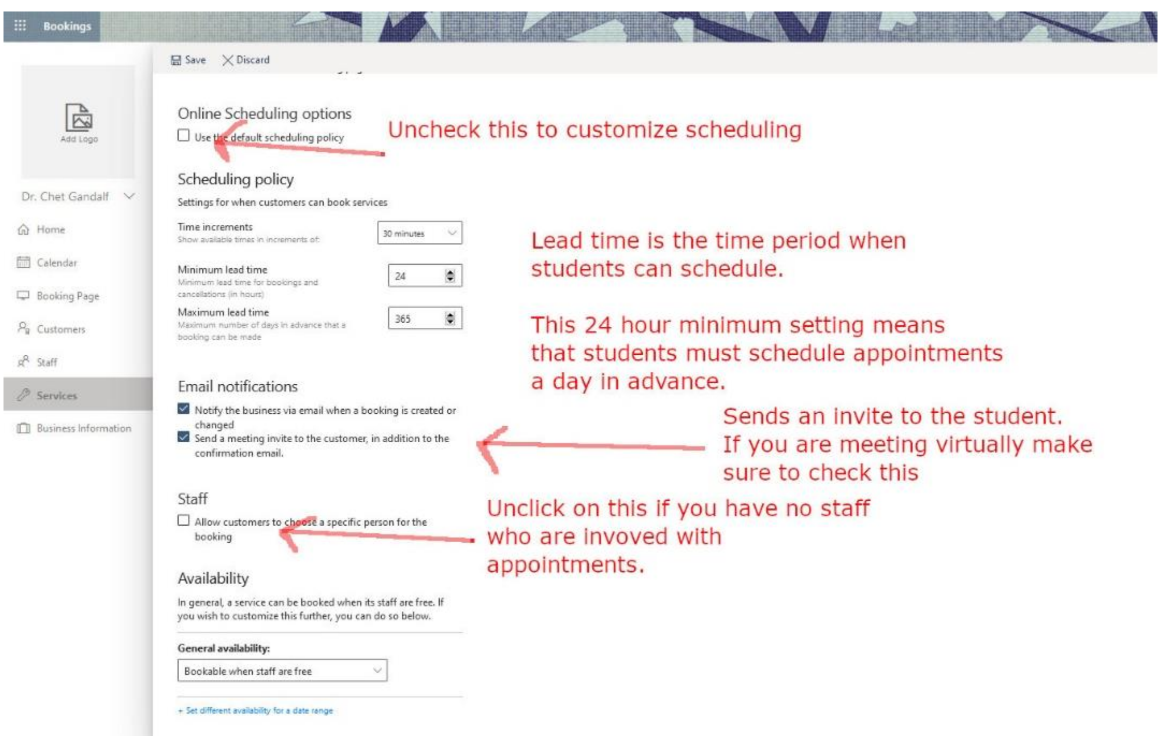
18. You may be asked to save the custom questions; then proceed with the rest of the Services menu.



19. Bookings will send a reminder to the attendee a day into advance. The pen will allow you to add more reminders and customize the text.

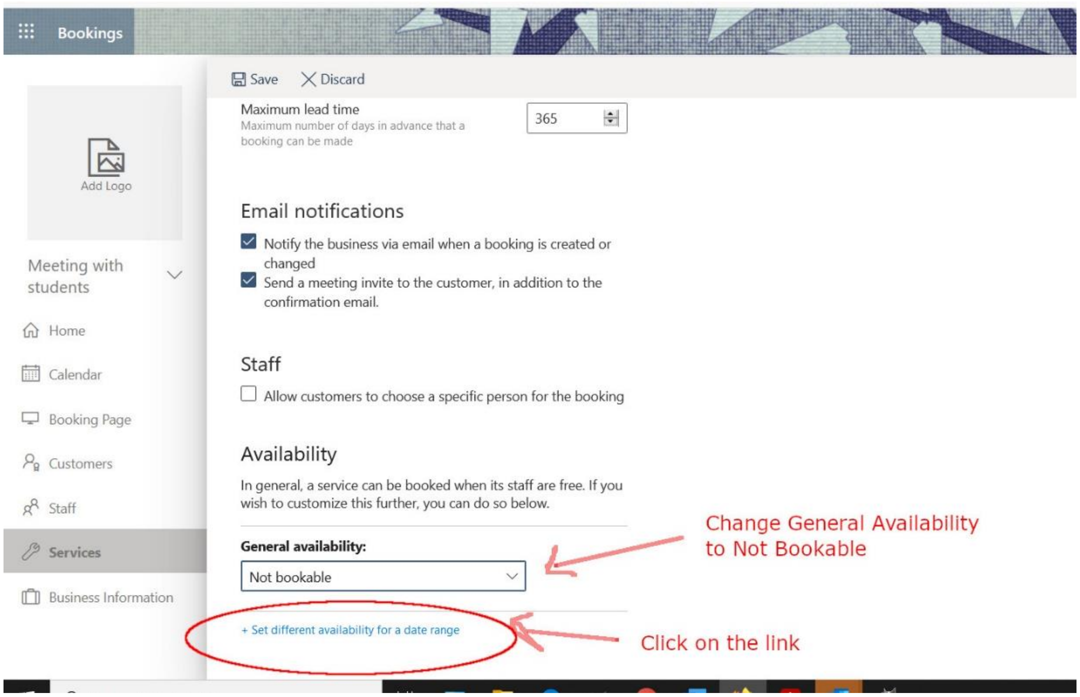


20. Uncheck the Use Default Scheduling Policy tick box to customize scheduling. You can set a Lead time which will prevent students from scheduling appointments at the last minute and allowing you to be more organized. Also make sure that the second e-mail notification tick box is ticked if you are meeting virtually. This will send out an invite with a Teams meeting link to the student.



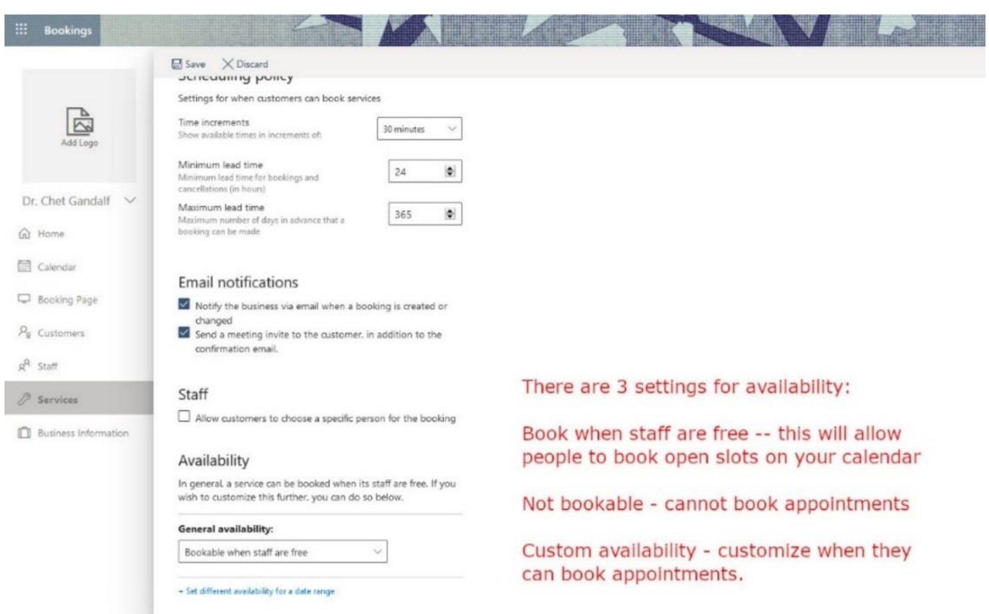
21. You can set up general availability for long-term appointment slots – like office hours, and you can set availability for specific time periods, like advising.

Here we are talking about how to set up Bookings for advising week, so we'll skip adding general availability and click on the link for '**Set a different availabiility for a date range'** since we only need students to pick times from slots over a week or so.

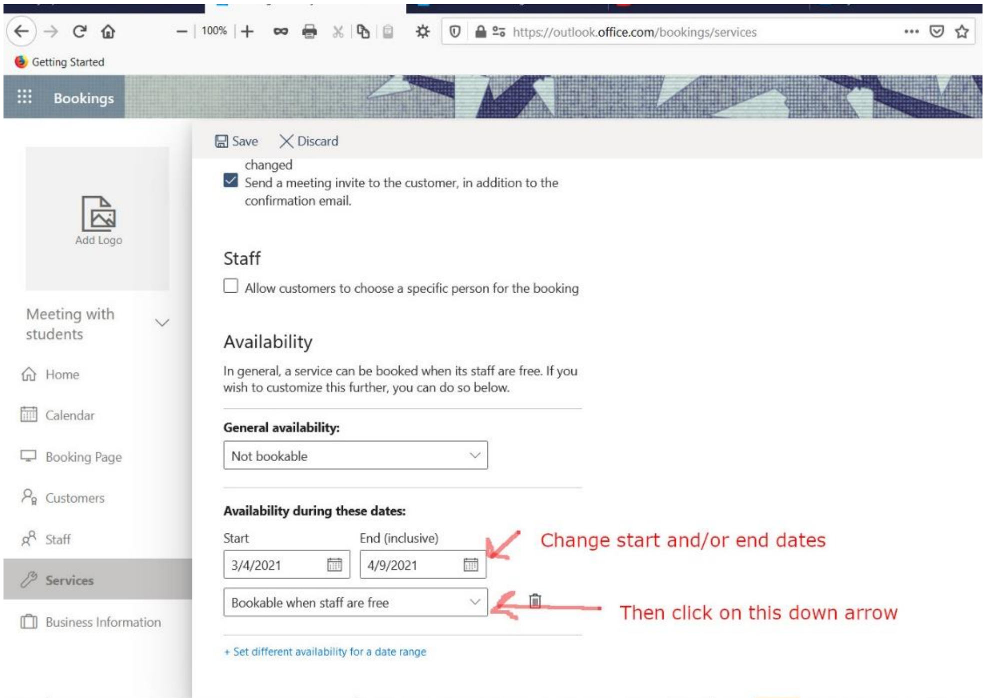


There are three settings for availability**.** 1) **Book When Staff is Free**, 2) **Not Bookable**, and 3) **Custom Availability**.

I suspect that **Custom Availability** will be what most people use. If you use **Book When Staff is Free**, students can book any time that is not taken up by another meeting or appointment. If you use **Book when Staff is Free**, you will want to block off parts of your calendar when you don't want to have meetings, so you can have some control over your calendar and not be completely at the mercy of your student's scheduling whims.

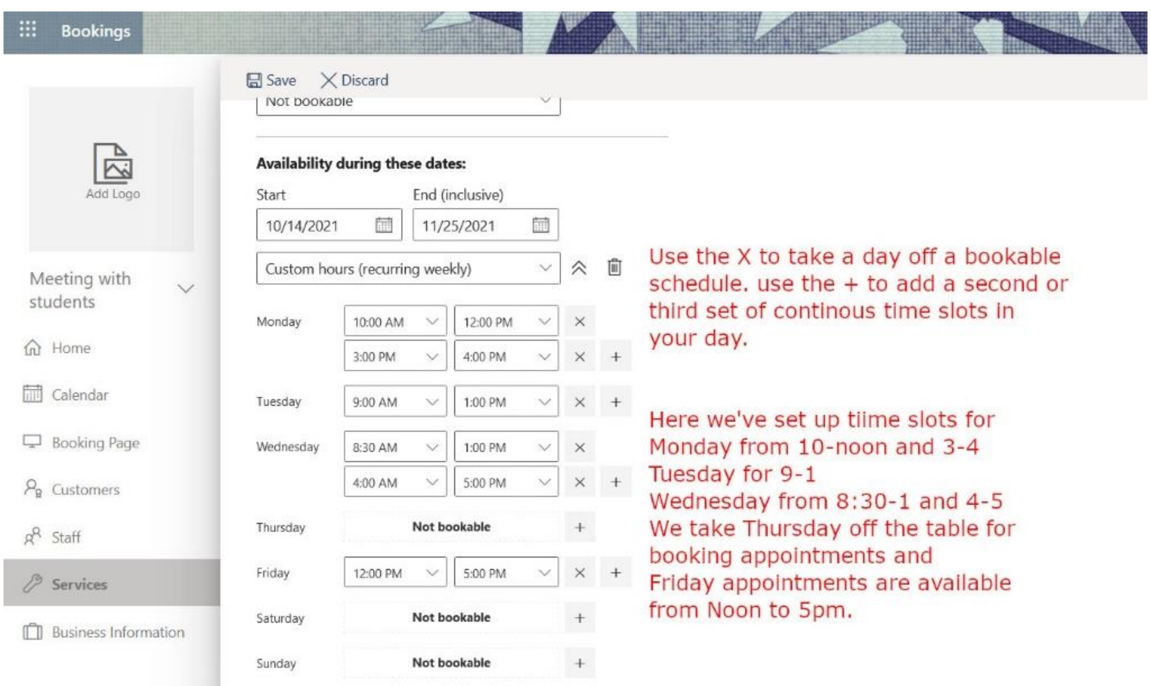


22. Under Availability during these dates, change the start and end date of your advising period. Then click on the down arrow under Bookable when staff is free – we will want to change that to Custom Availability.

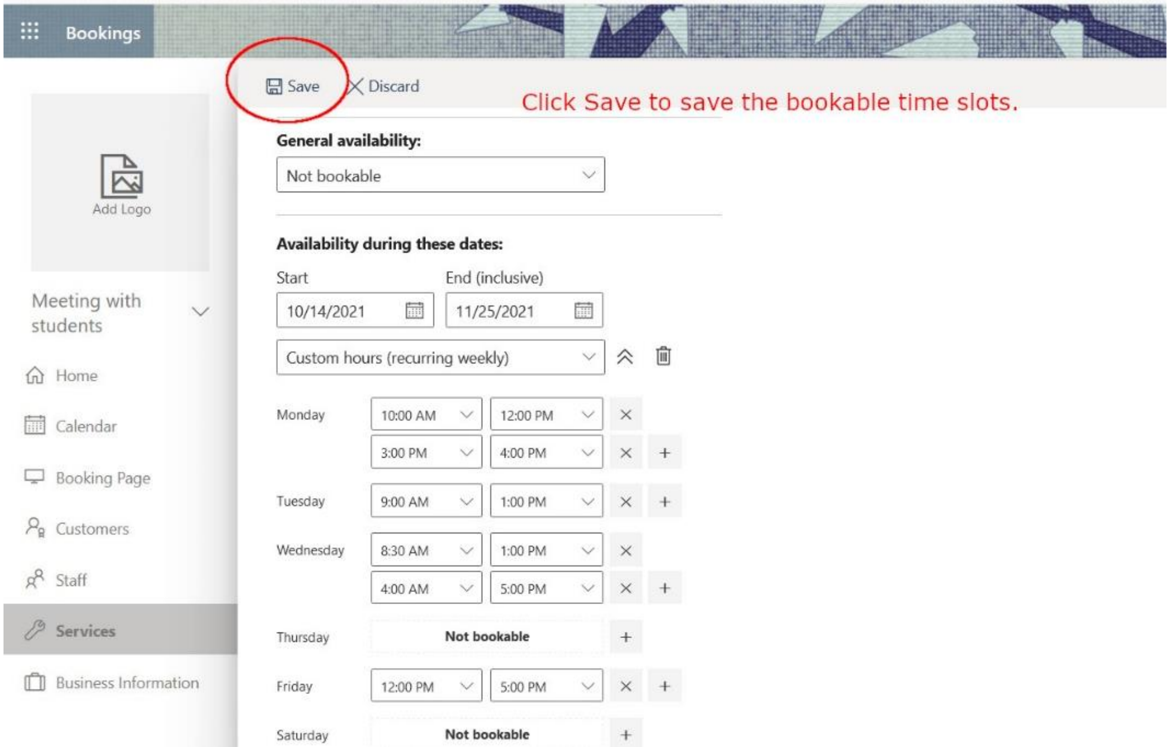


23. Pick times for each day using the dropdown sliders. Omit times that you are in a meeting, a class or have some time that you won't be available. After that meeting or class is done, you can create a second, third or fourth scheduling block during the day by clicking on the + icon. Similarly, you can X out a day if you are completely off.

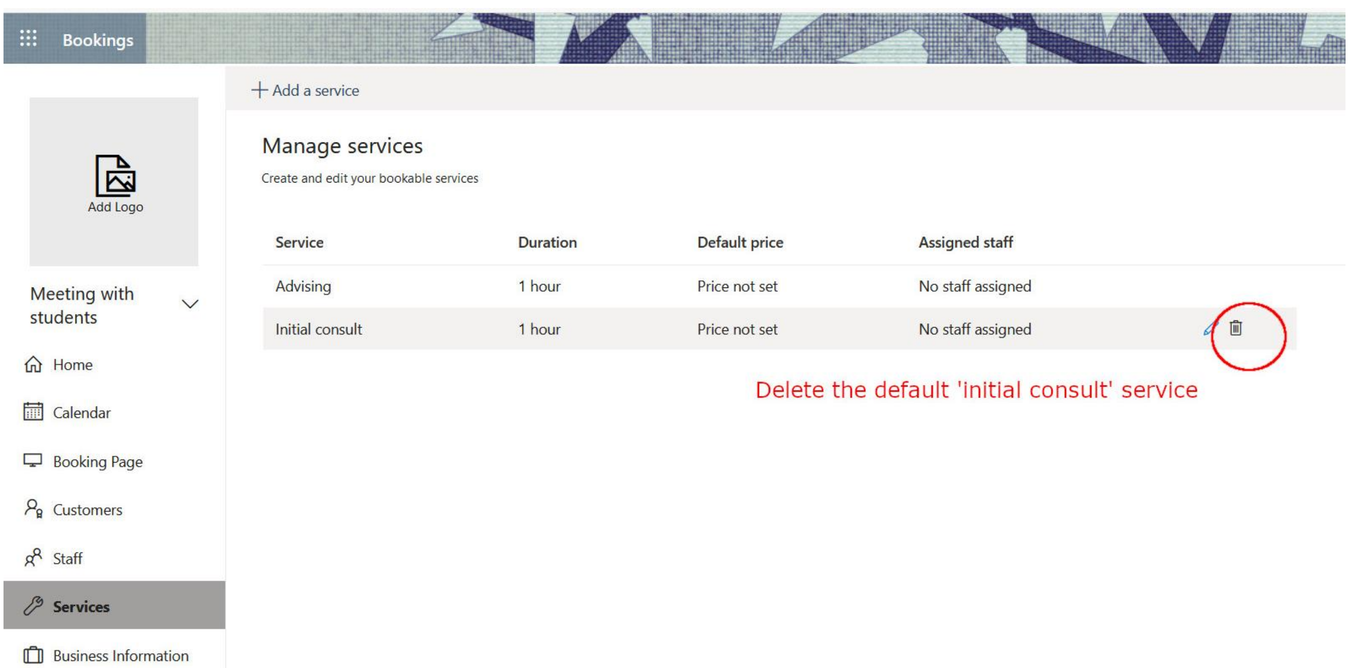
Here, Thursday is lopped off the schedule. Monday and Wednesday have a couple of blocks of time where students can schedule meetings.



24. So we’ve picked out some dates in October and November of 2021 and our schedule for those dates. We’ll click on Save now.

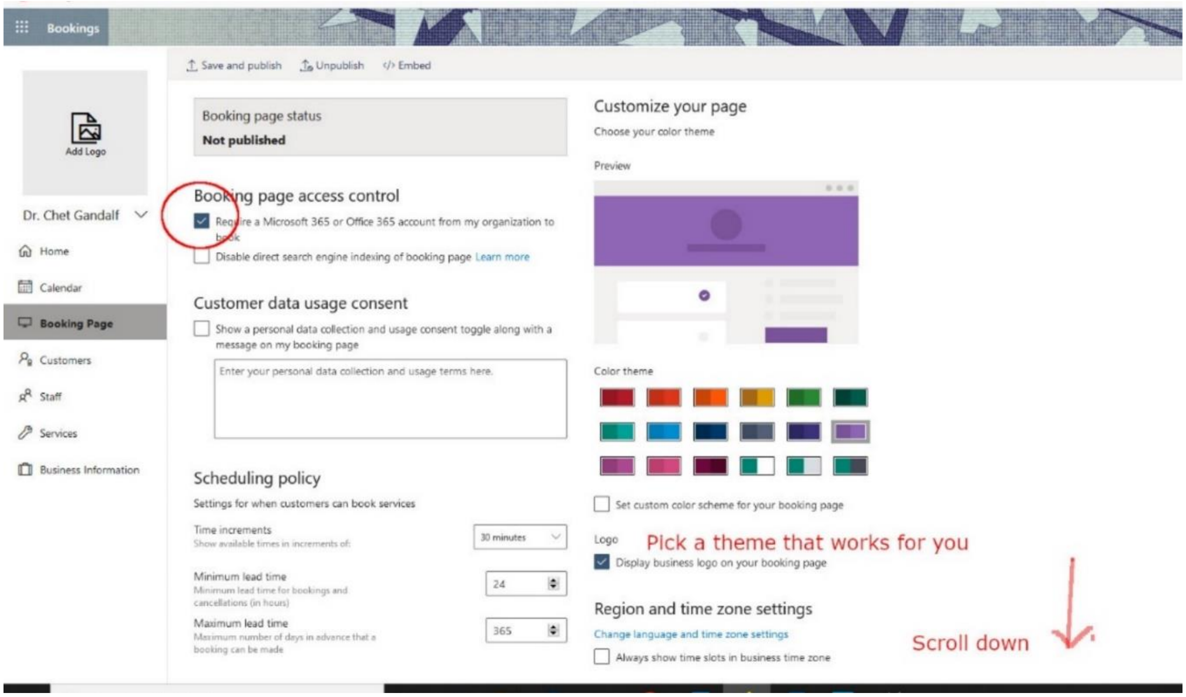


25. After you’ve saved the Advising service, delete the default Initial Consult service.



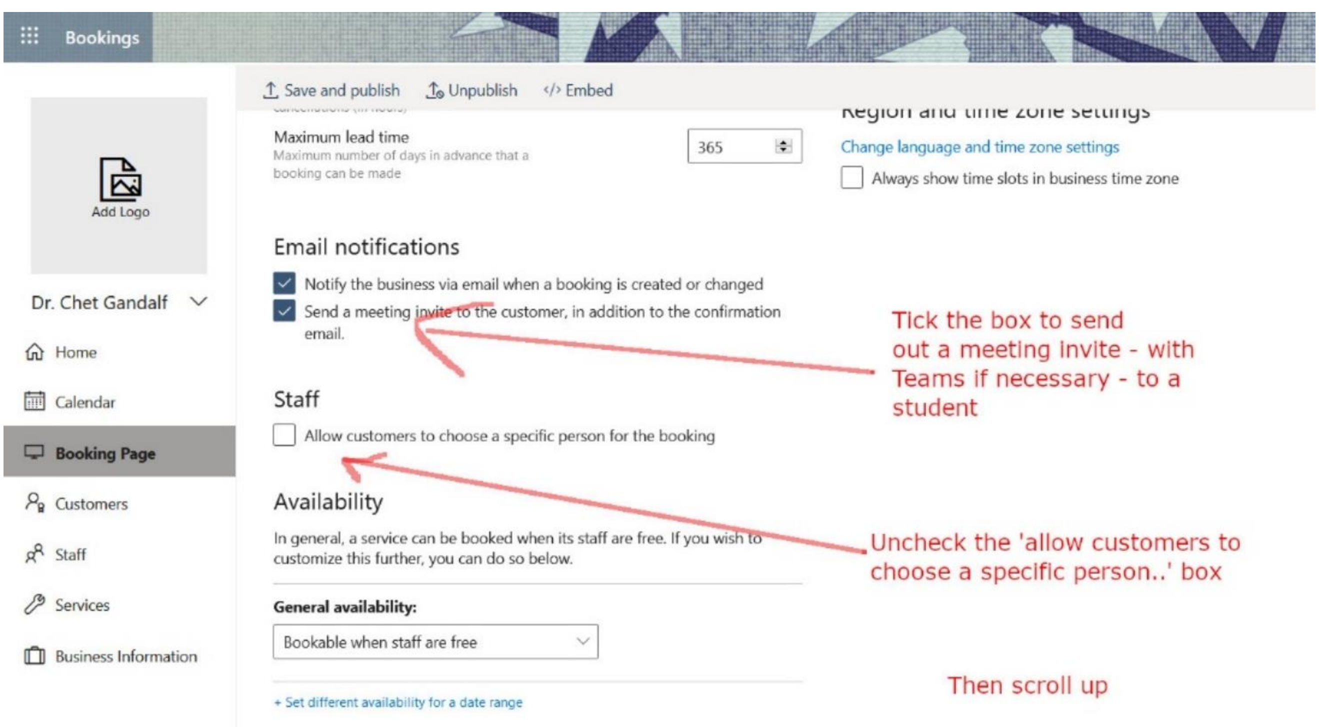
26. Now go to the Bookings Page area on the left-hand side of the page. Tick the first box under Bookings Page Access Control so that this bookings application is open to people at Hanover – that is, your students. You can pick a theme for the Booking page that you like.

    Next, we'll scroll down to make a few more changes.

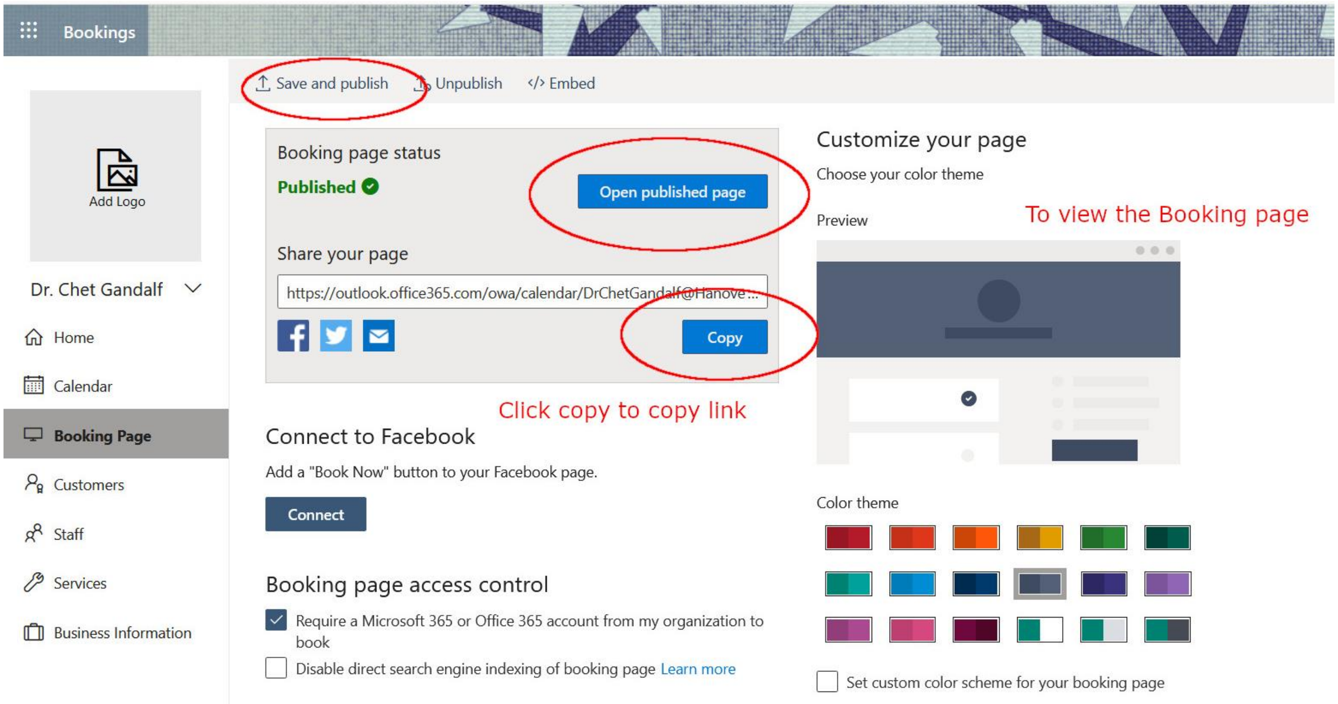


27. Make sure that the second notification for Send a Meeting is ticked, particularly if you are having a virtual meeting. This will send out a Teams invite and link so that the student can meet online.

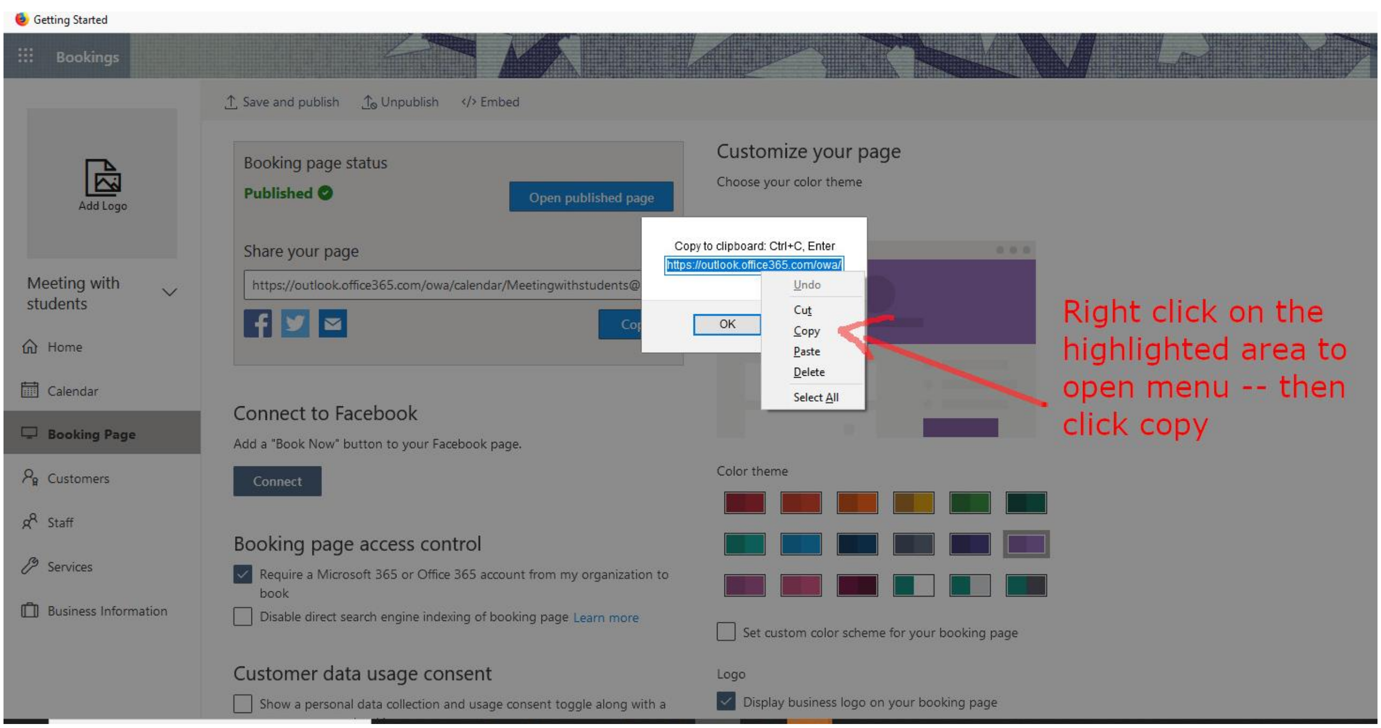
    Uncheck the Allow Customers to Choose…. Tick box if you are not sharing a Bookings service page with colleagues.



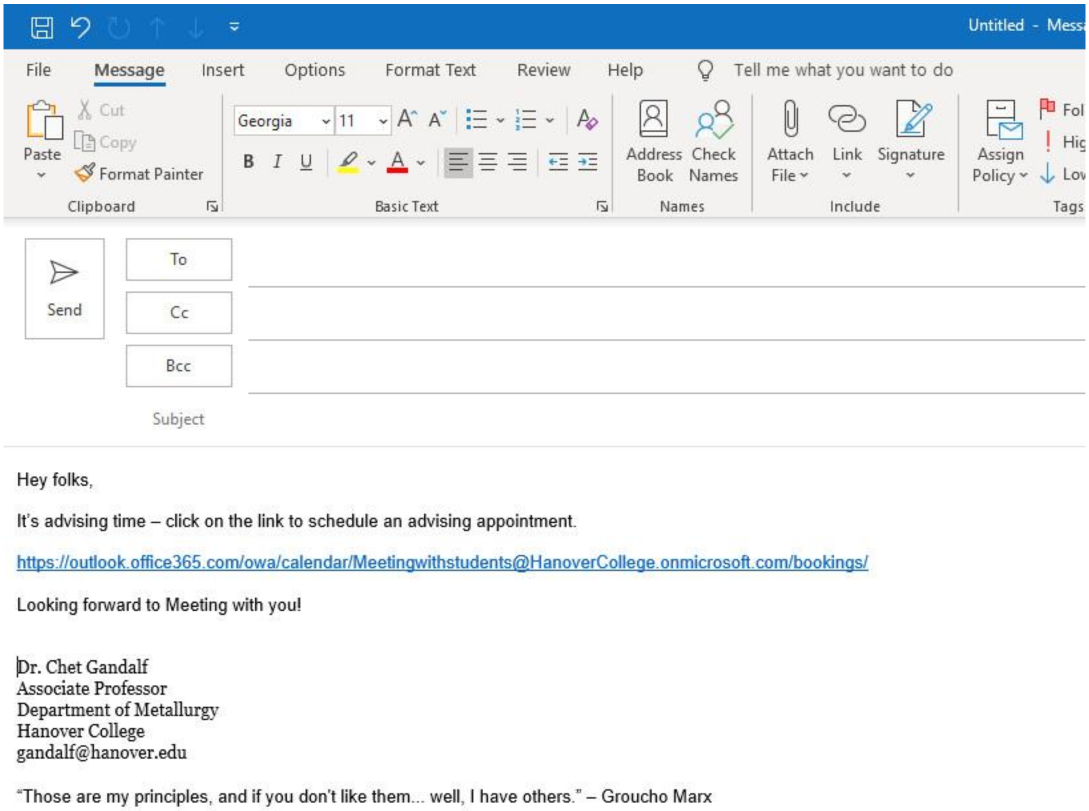
28. Click **Save and Publish**. If you want to view the bookings page, click on the Open Published Page. You can copy the link by clicking on the button and adding it to an e-mail or to a Moodle page.



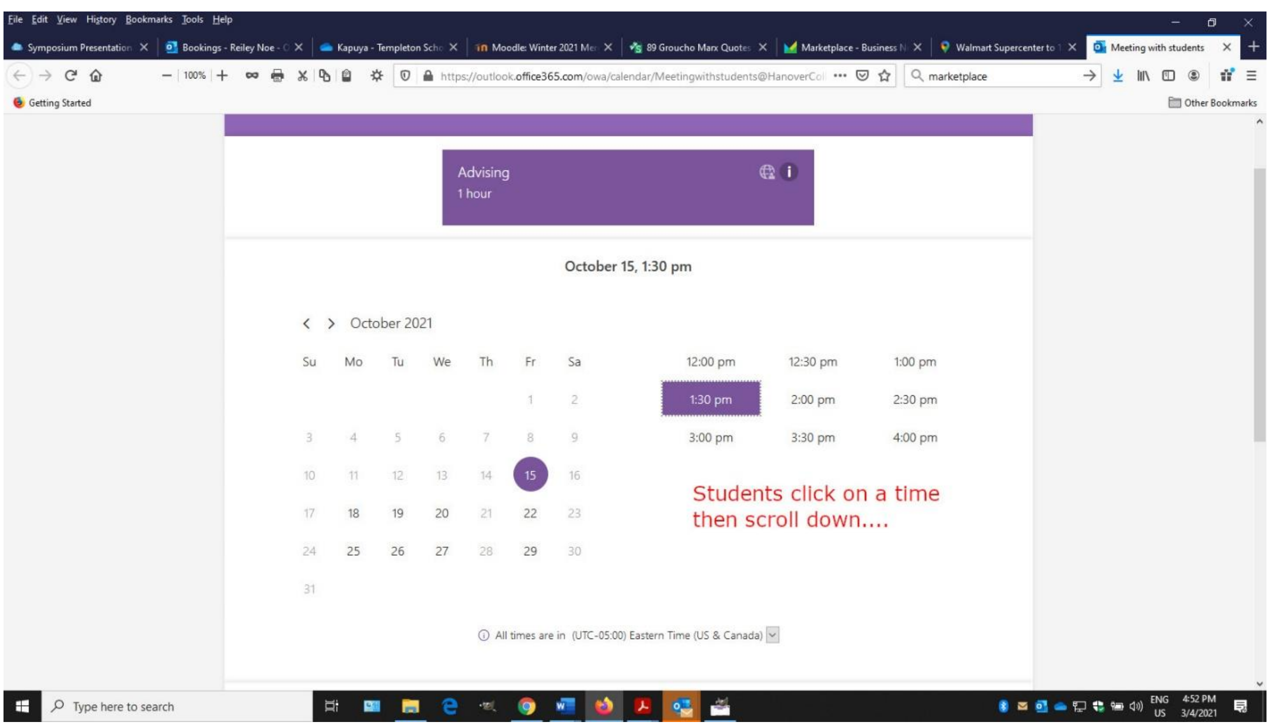
29. When you click Copy, you'll get this dialog box. Unlike other Microsoft Copy buttons, this does not automatically copy the link to the clipboard when you click it. You need to right click on the highlighted url and choose copy in the dialog box that appears.



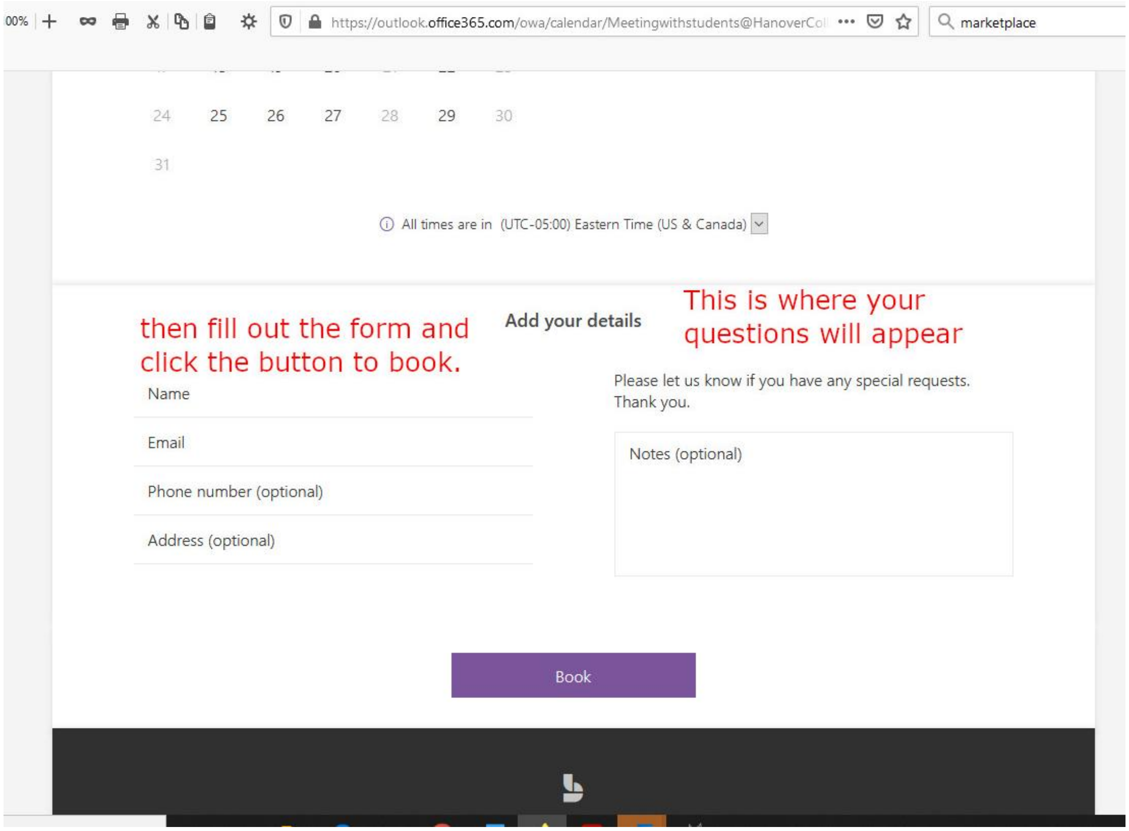
30. You can paste the URL into an email that you are sending out to students.



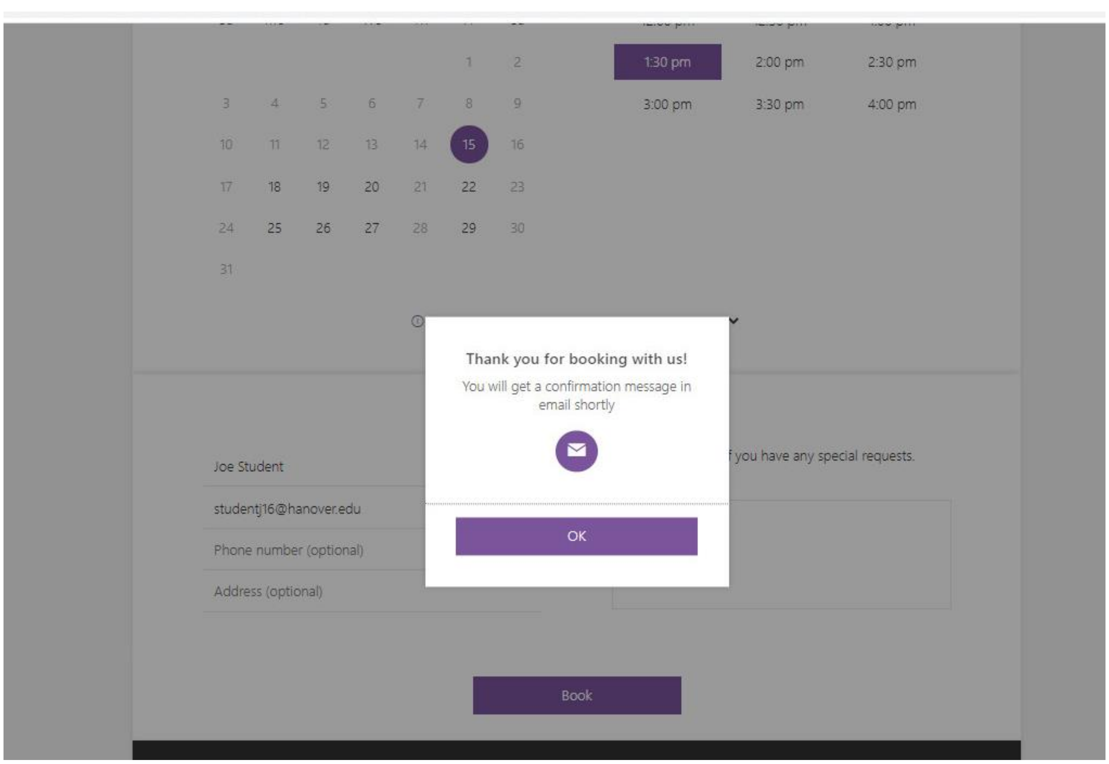
31. And when the students click on the link, this is what they see. It will here is what the page looks like for the student. They need to click on a date and then the available times appear – (somewhat annoyingly) displayed from right to left rather than vertically. They select a date and time then scroll down.



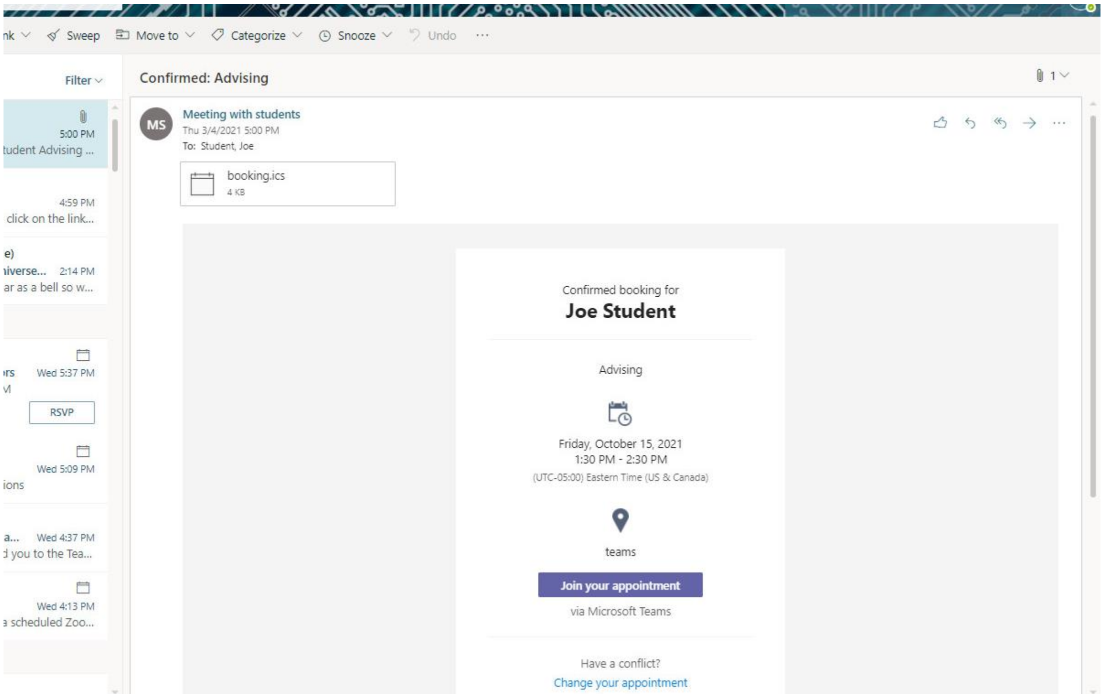
32. The student fills out their name and e-mail and other information. The two questions that we created appear below – the drop-down menu that will let them select the class that they are in, and the text question where they mention what they are interested in discussing. They click the Book button to book the appointment.



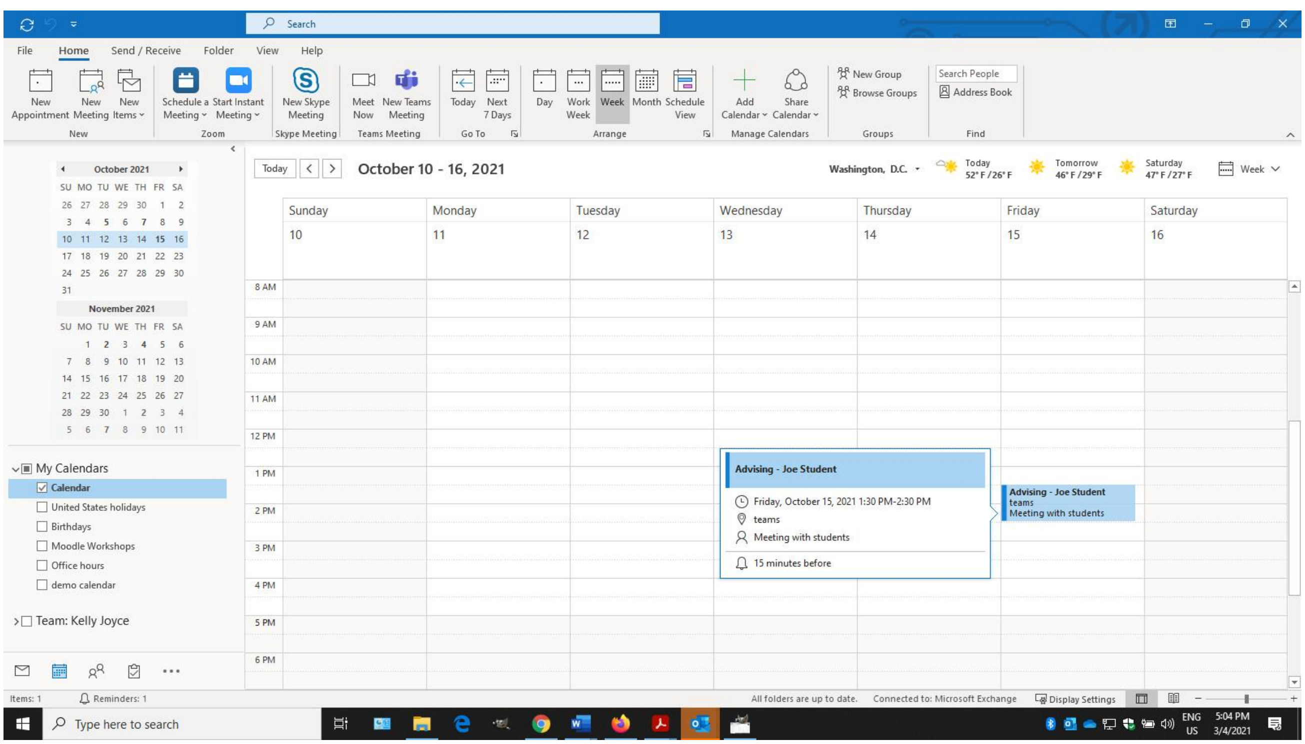
33. They receive a confirmation message.



34. They and you get an email confirmation with a link to Teams (for virtual meetings on Teams).



35. This is how it appears on an Outlook Calendar. When I hover over the meeting, this popup appears with the meeting's particulars. If you – or the student – click on the meeting in the Outlook Calendar, you'll see a link to the Teams Meeting.



Want to see more?

Microsoft Bookings App for Parent Teacher's Conferences (15:00) Mike Tolefsen (Microsoft)

Microsoft Bookings Resources: Penn State

Online Office Hours Through Microsoft Bookings – University of Chicago.