

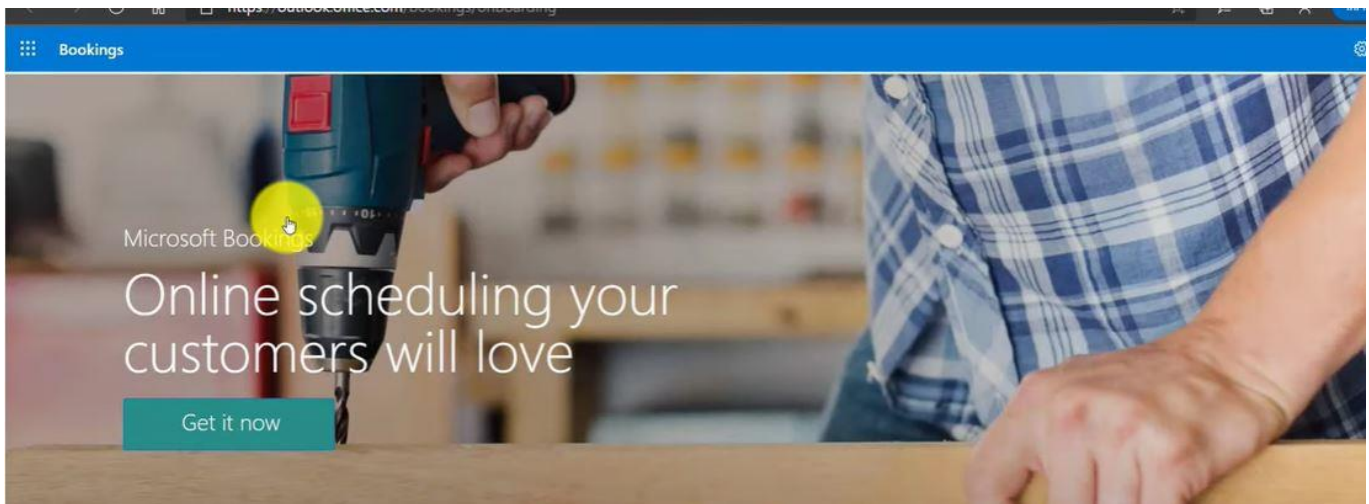
Using Microsoft Bookings for student advising appointments.

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.

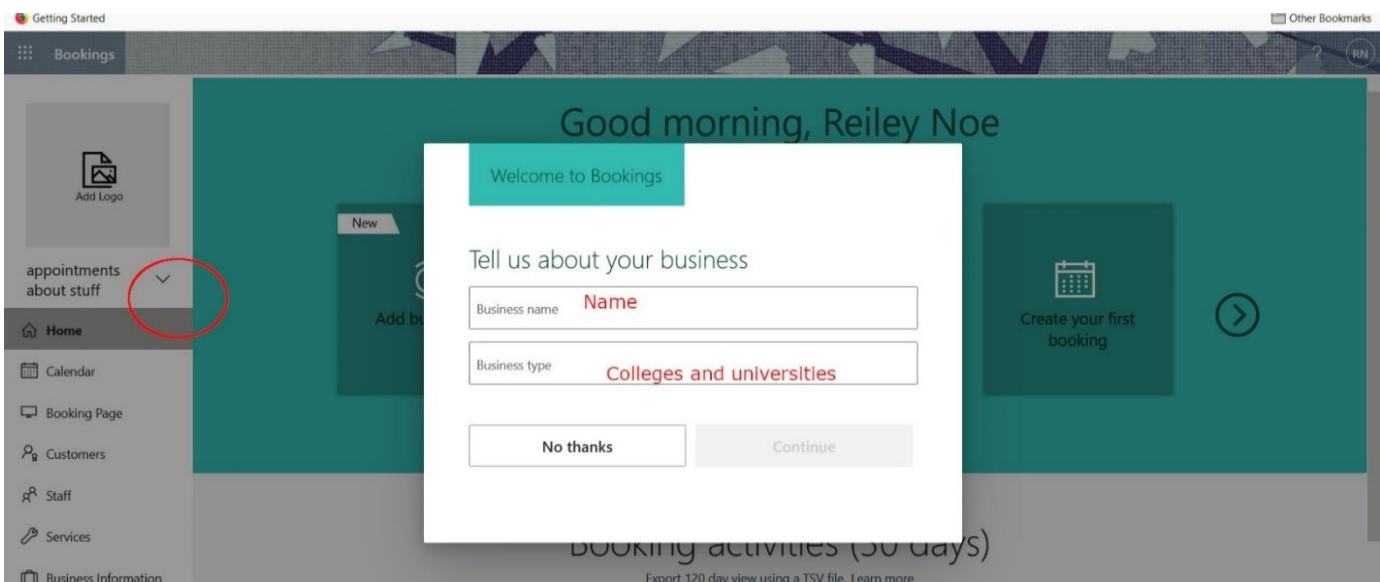
To get started

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.

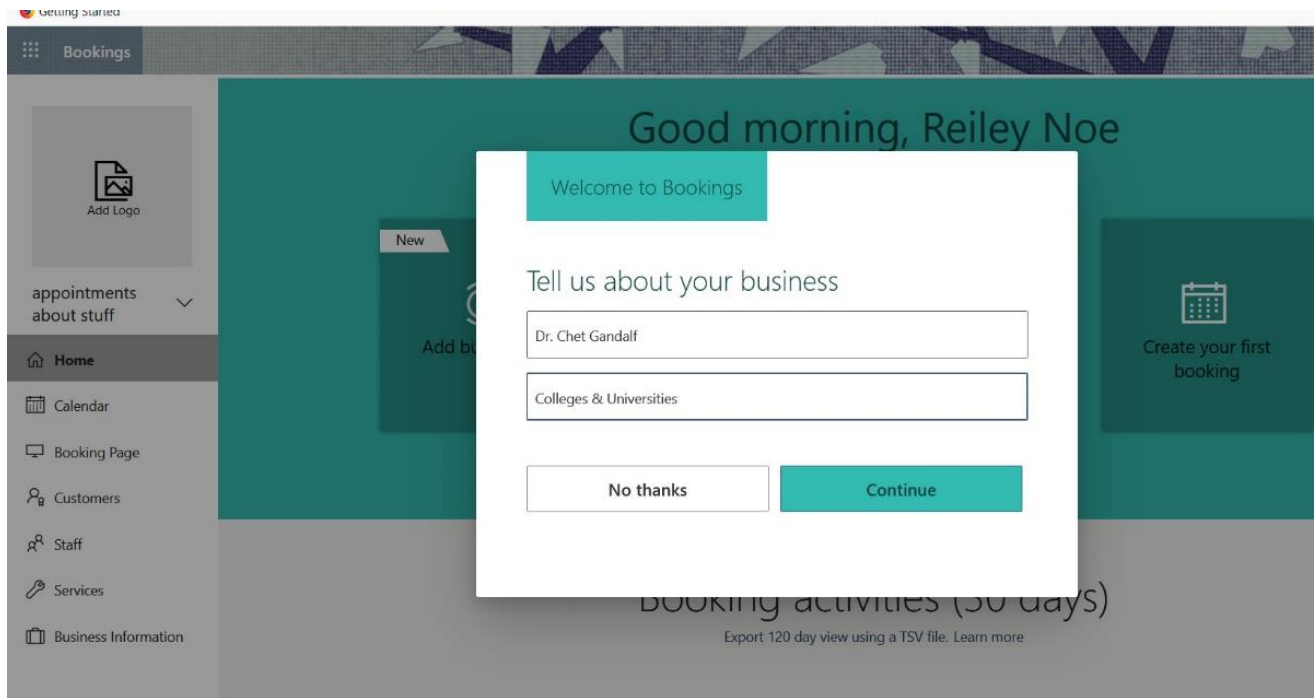


2. After you click Get It Now or if you have used Bookings before, you'll get the screen below. Click on the down arrow that is circled and then it will ask you to create a New Bookings 'business' or Open an old one. We are creating a new one here.

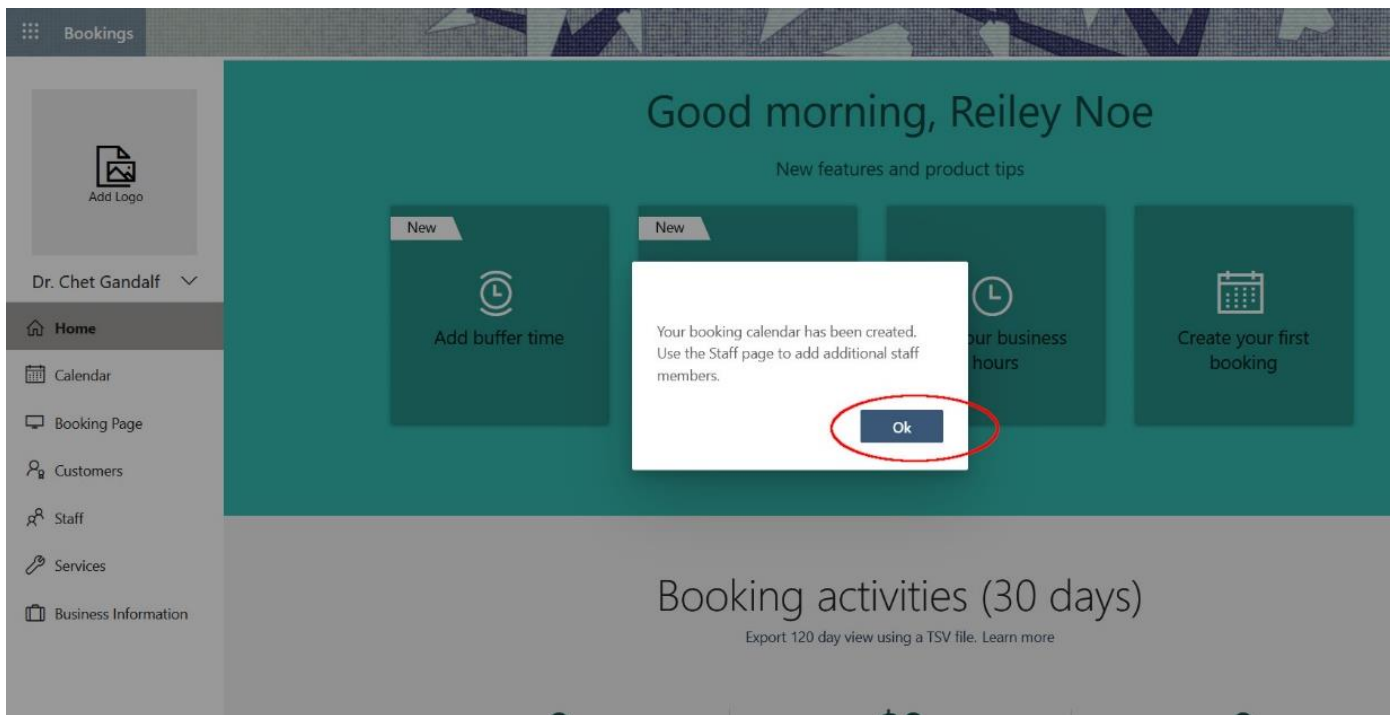
Note that Bookings uses private sector terminology. Add your name as the Business Name. Add Colleges and Universities as the Business Type



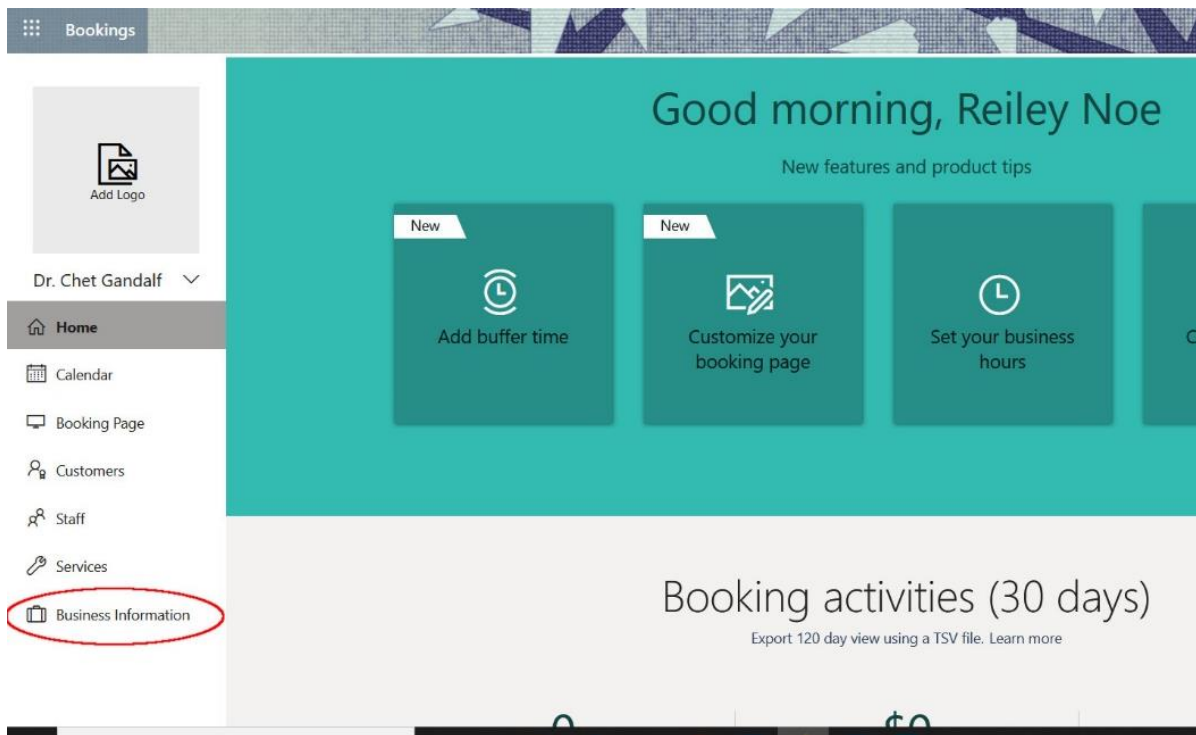
3. Click continue.



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.

Getting Started

Bookings

Save Discard

Add Logo

Dr. Chet Gandalf

Home

Calendar

Booking Page

Customers

Staff

Services

Business Information

Business information

Enter an address and contact information for your business. This will be used on the booking form and in booking messages and reminders.

Business name
Dr. Chet Gandalf

Business address
Add a location or a room

Business phone

Send customer replies to
noe@hanover.edu

Website URL

Privacy policy URL

Terms and conditions URL

Business type
Colleges & Universities

Currency
USD (\$)

Business logo
Add or change your business logo. This will appear in booking messages and reminders along with the business information you enter.

Business hours

Enter information about your business hours.

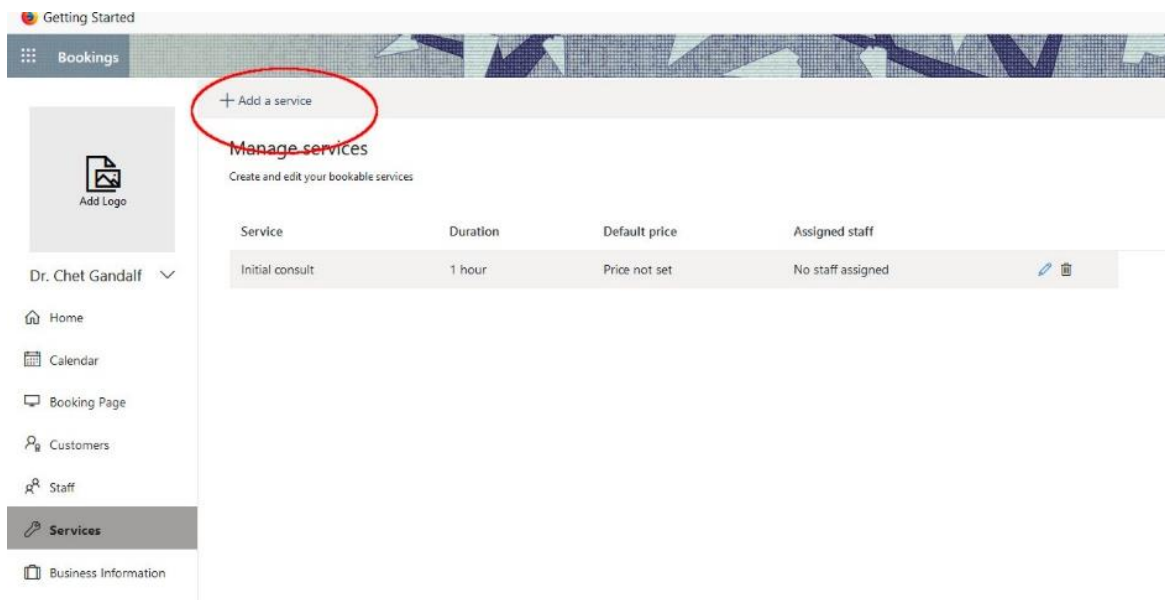
Day	Start Time	End Time	Action
Monday	8:00 AM	5:00 PM	X +
Tuesday	8:00 AM	5:00 PM	X +
Wednesday	8:00 AM	5:00 PM	X +
Thursday	8:00 AM	5:00 PM	X +
Friday	8:00 AM	5:00 PM	X +
Saturday	Closed		+
Sunday	Closed		+

Fill out information, if you'd like

Skip modifying the business hours now.

If you added something click Save, if not, click on 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.

Save Discard

Service name

Advising Appointments

Description

Default location

team

Use this location: team

- teams
- Teambirths Midwifery
2325 S Hanover Saluda Rd, Hanover, IN, 47243, United States
- Team Eps
2610 Arbor Tech Drive, Hebron, KY, 41048, United States
- Team RV Express
51796 Lovejoy Dr, Middlebury, IN, 46540, United States
- Team Collision Center of Princeton
2871 Us-1, Lawrenceville, NJ, 08648, United States

Maximum number of attendees per event

Maximum Attendees 1

Add name -- Advising appointments will do

You can make a physical or a virtual meeting. Here we'll use Teams as the default location

select Teams from the menu

9. Tick the sliders described below:

The screenshot shows the 'Bookings' settings page. On the left is a sidebar with a user profile 'Dr. Chet Gandalf' and navigation links: Home, Calendar, Booking Page, Customers, Staff, Services (highlighted), and Business Information. The main content area has a 'Save' button and a 'Discard' button. Below these are several settings: 'Default location' (a dropdown menu showing 'teams'), 'Add online meeting' (a toggle switch that is currently turned on), 'Default Duration' (three dropdown menus for Days, Hours, and Minutes, currently set to 0, 0, and 30 respectively), 'Buffer time your customers can't book' (a toggle switch that is currently turned off), 'Let customers manage their appointment when it was booked by you or your staff on their behalf.' (a toggle switch that is currently turned on), 'Maximum number of attendees per event' (a dropdown menu showing '1'), 'Default price' (a dropdown menu showing 'Price not set'), and 'Notes (internal only)' (a text area). At the bottom is a 'Custom Fields' section. Red arrows point to the 'Add online meeting' toggle with the text 'For an online meeting, move the slider.', to the 'Default Duration' dropdowns with the text 'You can modify the meeting duration', to the 'Let customers manage their appointment...' toggle with the text 'Move this slider so that students can book their own appointments.', and to the 'Custom Fields' section with the text 'Scroll down'.

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.

The screenshot shows the 'Custom Fields' settings page. On the left is the same sidebar as the previous screenshot. The main content area has a 'Save' button and a 'Discard' button. Below these is the 'Custom Fields' section, which says 'No custom fields selected. You can modify the selected fields below.' and has a 'Modify' button circled in red. Below this is the 'Reminders and Confirmations' section, which has a '1 day' reminder set. Below that is the 'Additional Information for Email Confirmation' section, which has a text area for adding information. At the bottom is a checkbox for 'Enable text message notifications for your customer.' with a warning message below it. Red arrows point to the 'Modify' button with the text 'Custom fields allow you to have students answer questions as they book' and to the '1 day' reminder with the text 'We'll do that now'.

11. Click on Add a Question.

[illegible]

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.

re

✕ Discard

Custom Fields

Custom fields selected. You can modify the selected fields.

Modify

Fields and Confirmations

🔔 : Just a quick reminder that your service is booked. I can email a reminder.

Additional Information for Email Confirmation

✎ Add any additional information and links to send to people who book this service with you. They will see this content in their email confirmation they receive.

Enable text message notifications for your customer.

IMPORTANT: This is a preview feature provided at no additional cost. Eventually a limit may be imposed on the number of free SMS messages you can send each month. By using this feature, you acknowledge that you are aware of this potential change. You may stop using this feature at any time by unclicking this checkbox.

✓ Ok + Add a question ▼

Add text question

Add dropdown question

Select what customer details you want displayed on the booking page. Name is always required.

Customer email	<input checked="" type="checkbox"/> Required
Phone number	<input type="checkbox"/> Required
Customer address	<input type="checkbox"/> Required
Customer notes	<input type="checkbox"/> Required

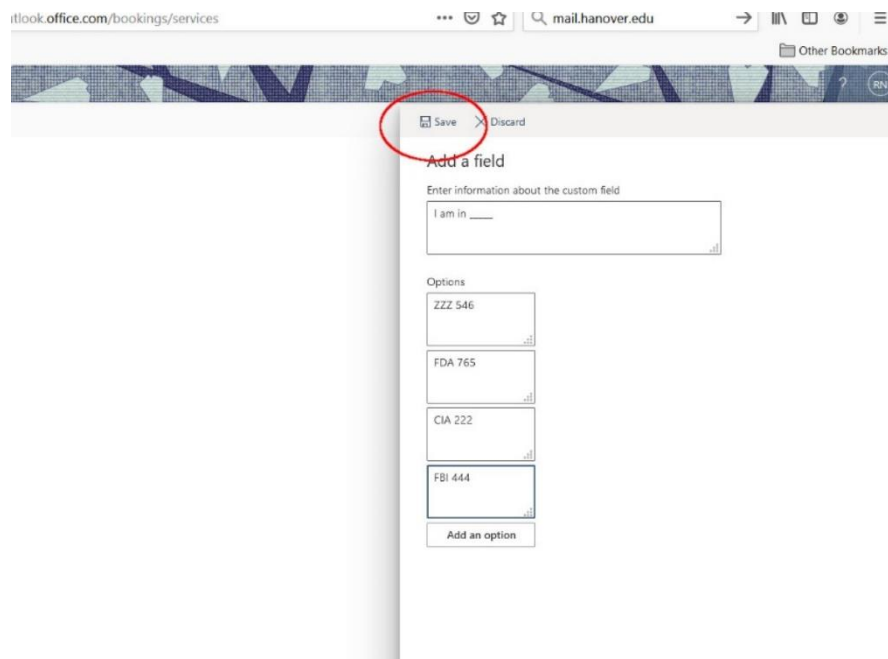
Custom Fields

Select custom fields to add to the service.

Custom fields display order

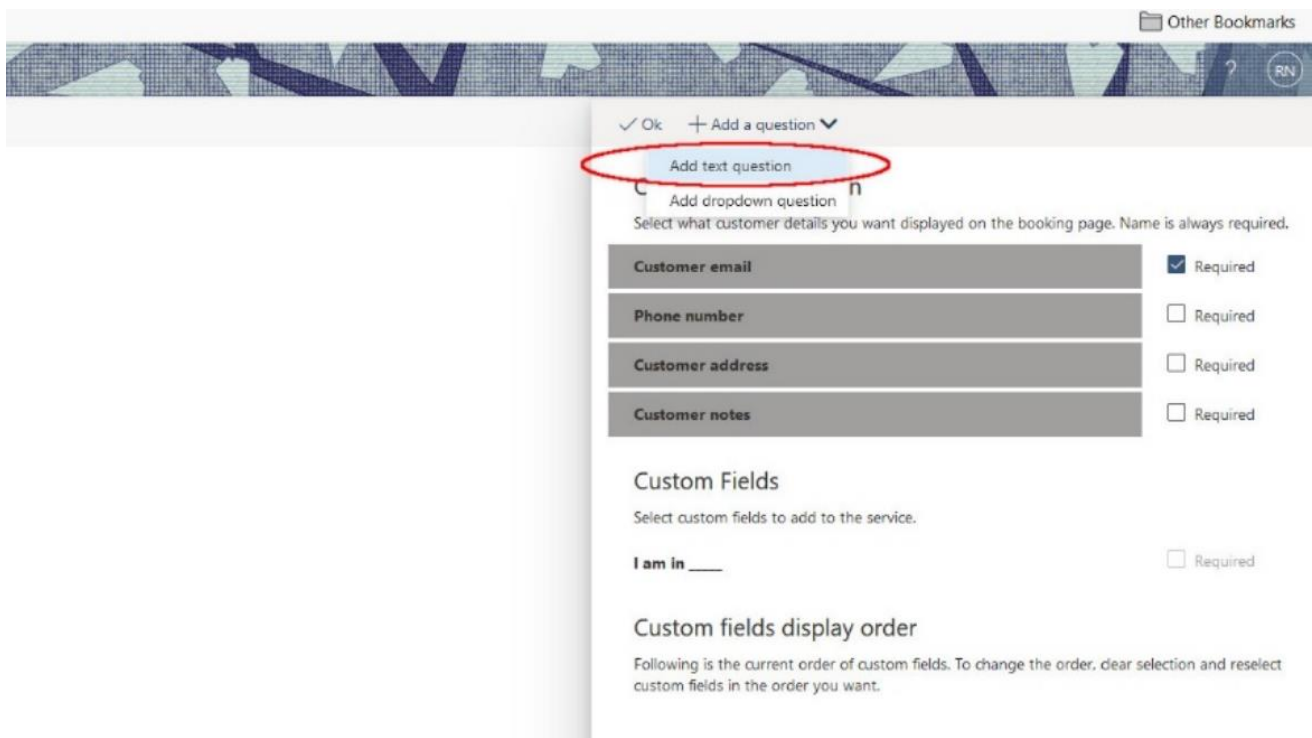
Following is the current order of custom fields. To change the order, clear selection and reselect custom fields in the order you want.

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



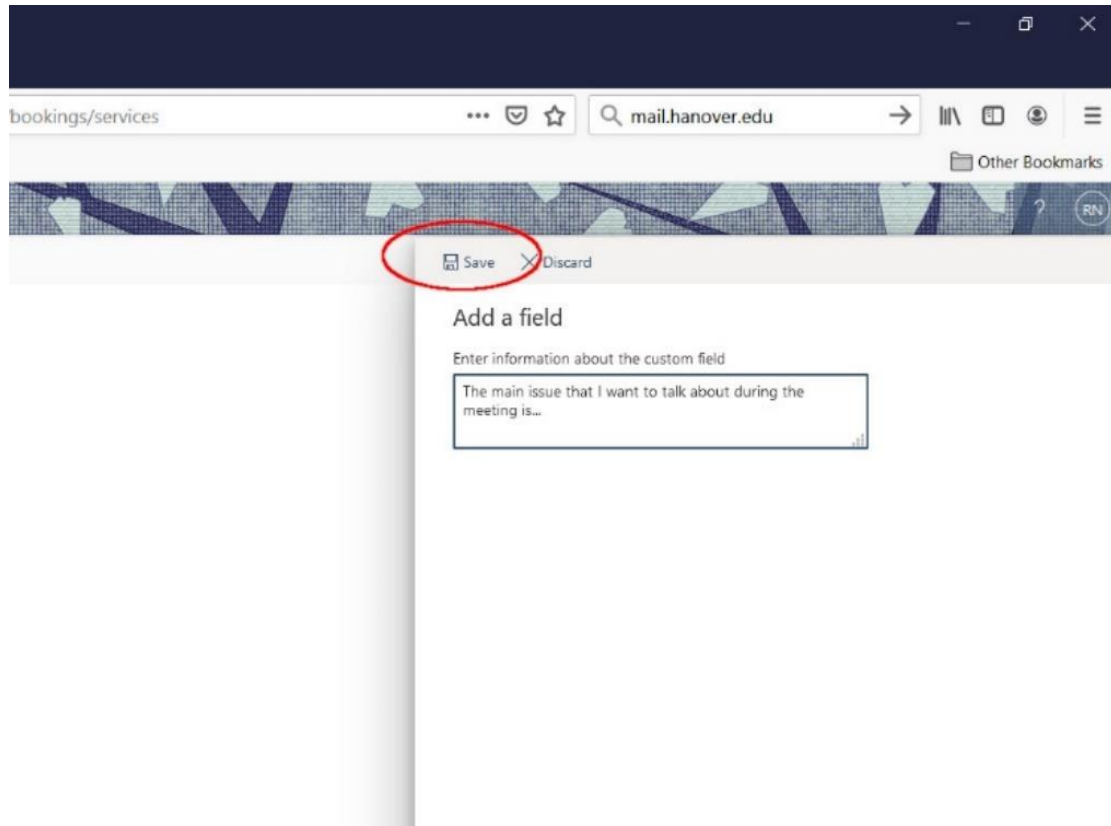
The screenshot shows the Outlook Office 365 interface with the URL `itlook.office.com/bookings/services` in the address bar. A modal dialog titled "Add a field" is open. At the top of the dialog, there are "Save" and "Discard" buttons. The "Save" button is circled in red. Below the buttons, the dialog prompts the user to "Enter information about the custom field" with a text input field containing "I am in ____". Under the "Options" section, there are four dropdown menus with the following values: "ZZZ 546", "FDA 765", "CIA 222", and "FBI 444". At the bottom of the options section is a button labeled "Add an option".

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

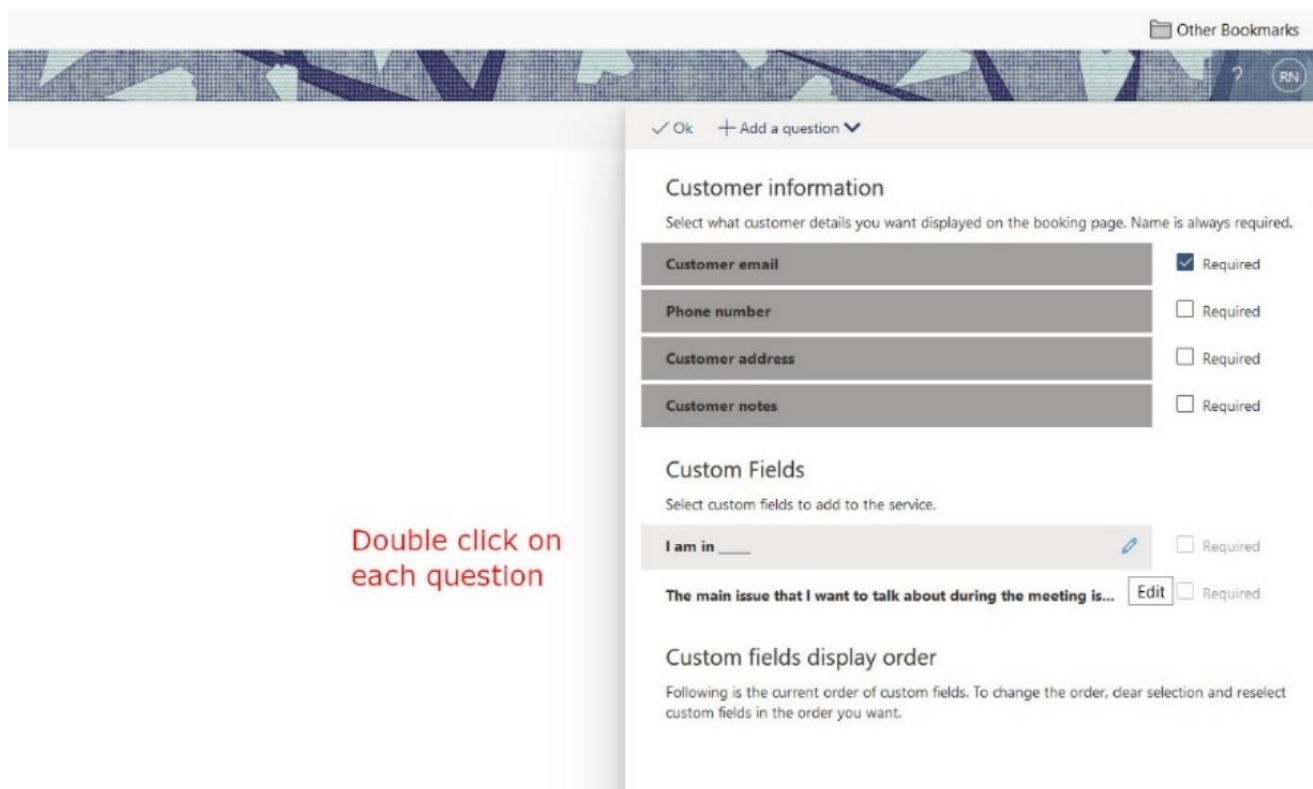


The screenshot shows the Outlook Office 365 interface with the URL `itlook.office.com/bookings/services` in the address bar. A modal dialog titled "Add a question" is open. At the top of the dialog, there are "Ok" and "Add a question" buttons. The "Add a question" button is circled in red. Below the buttons, the dialog prompts the user to "Select what customer details you want displayed on the booking page. Name is always required." There are four checkboxes with labels: "Customer email" (checked), "Phone number", "Customer address", and "Customer notes". Below this section is a section titled "Custom Fields" with the text "Select custom fields to add to the service." and a checkbox labeled "I am in ____" (unchecked). At the bottom of the dialog is a section titled "Custom fields display order" with the text "Following is the current order of custom fields. To change the order, clear selection and reselect custom fields in the order you want."

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.

✓ Ok + Add a question ▼

Customer information

Select what customer details you want displayed on the booking page. Name is always required.

Customer email	<input checked="" type="checkbox"/> Required
Phone number	<input type="checkbox"/> Required
Customer address	<input type="checkbox"/> Required
Customer notes	<input type="checkbox"/> Required

Custom Fields

Select custom fields to add to the service.

I am in ____	<input type="checkbox"/> Required
The main issue that I want to talk about during the meeting is...	<input type="checkbox"/> Required

Custom fields display order

Following is the current order of custom fields. To change the order, clear selection and reselect custom fields in the order you want.

I am in ____
The main issue that I want to talk about during the meeting is...

They will appear here

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

Getting Started

Bookings

Save Discard

Please save the service after changing selections in custom fields screen.

0 required and 2 optional custom fields selected. You can modify the selected fields below.

Modify

Reminders and Confirmations

1 day : Just a quick reminder that your ser... ⬆ ⬇ ✕

Add an email reminder

Additional Information for Email Confirmation

Add any additional information and links to send to people that book this service with you. They will see this content in the email confirmation they receive.

☐ Enable text message notifications for your customer.

IMPORTANT: This is a preview feature provided at no additional cost. Eventually a limit may be imposed on the number of free SMS messages you can send each month. By using this feature, you acknowledge that you are aware of this potential change. You may stop using this feature at any time by unchecking this checkbox.

[Learn more](#)

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.

Bookings will send a reminder a day in advance of the meeting.

Click on the pen to customize the reminder

Scroll down

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.

Uncheck this to customize scheduling

Lead time is the time period when students can schedule.

This 24 hour minimum setting means that students must schedule appointments a day in advance.

Sends an invite to the student. If you are meeting virtually make sure to check this

Unclick on this if you have no staff who are involved with appointments.

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 availability for a date range**' since we only need students to pick times from slots over a week or so.

The screenshot shows the 'Bookings' settings page. On the left is a sidebar with navigation links: Meeting with students, Home, Calendar, Booking Page, Customers, Staff, Services (highlighted), and Business Information. The main content area has tabs for 'Save' and 'Discard'. Under 'Maximum lead time', the value is 365. Under 'Email notifications', both checkboxes are checked. Under 'Staff', the checkbox is unchecked. Under 'Availability', the 'General availability' dropdown is set to 'Not bookable'. A red circle highlights the link '+ Set different availability for a date range' below the dropdown. Two red arrows point to this link with the text 'Click on the link' and 'Change General Availability to Not Bookable'.

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.

The screenshot shows the 'Bookings' settings page with the 'General availability' dropdown set to 'Bookable when staff are free'. The sidebar is the same as in the previous screenshot. The main content area shows 'Settings for when customers can book services' with 'Time increments' set to 30 minutes, 'Minimum lead time' set to 24, and 'Maximum lead time' set to 365. Under 'Email notifications', both checkboxes are checked. Under 'Staff', the checkbox is unchecked. Under 'Availability', the 'General availability' dropdown is set to 'Bookable when staff are free'. A red circle highlights the link '+ Set different availability for a date range' below the dropdown. To the right of the screenshot, there is a list of three settings for availability: 'Book when staff are free -- this will allow people to book open slots on your calendar', 'Not bookable - cannot book appointments', and 'Custom availability - customize when they can book appointments'.

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.

Getting Started

Bookings

Save Discard

changed

☒ Send a meeting invite to the customer, in addition to the confirmation email.

Staff

☐ 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:

Not bookable

Availability during these dates:

Start End (inclusive)

3/4/2021 4/9/2021

Bookable when staff are free

+ Set different availability for a date range

Change start and/or end dates

Then click on this down arrow

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.

Bookings

Save Discard

Not bookable

Availability during these dates:

Start End (inclusive)

10/14/2021 11/25/2021

Custom hours (recurring weekly)

Day	Time Slot 1	Time Slot 2	Action
Monday	10:00 AM - 12:00 PM	3:00 PM - 4:00 PM	X +
Tuesday	9:00 AM - 1:00 PM		X +
Wednesday	8:30 AM - 1:00 PM	4:00 AM - 5:00 PM	X +
Thursday	Not bookable		+
Friday	12:00 PM - 5:00 PM		X +
Saturday	Not bookable		+
Sunday	Not bookable		+

Use the X to take a day off a bookable schedule. use the + to add a second or third set of continuous time slots in your day.

Here we've set up time slots for Monday from 10-noon and 3-4 Tuesday for 9-1 Wednesday from 8:30-1 and 4-5 We take Thursday off the table for booking appointments and Friday appointments are available from Noon to 5pm.

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.

The screenshot shows the 'Bookings' interface. At the top, there is a 'Save' button circled in red, next to a 'Discard' button. Below this, a red text prompt says 'Click Save to save the bookable time slots.' The main content area is titled 'General availability:' and shows a dropdown menu set to 'Not bookable'. Below this, there is a section titled 'Availability during these dates:' with a date range from '10/14/2021' to '11/25/2021'. A dropdown menu shows 'Custom hours (recurring weekly)'. The interface then displays a grid of days (Monday through Saturday) with time slots (e.g., 10:00 AM, 12:00 PM, 3:00 PM, 4:00 PM) and buttons to add or remove availability. The 'Services' menu on the left is highlighted.

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

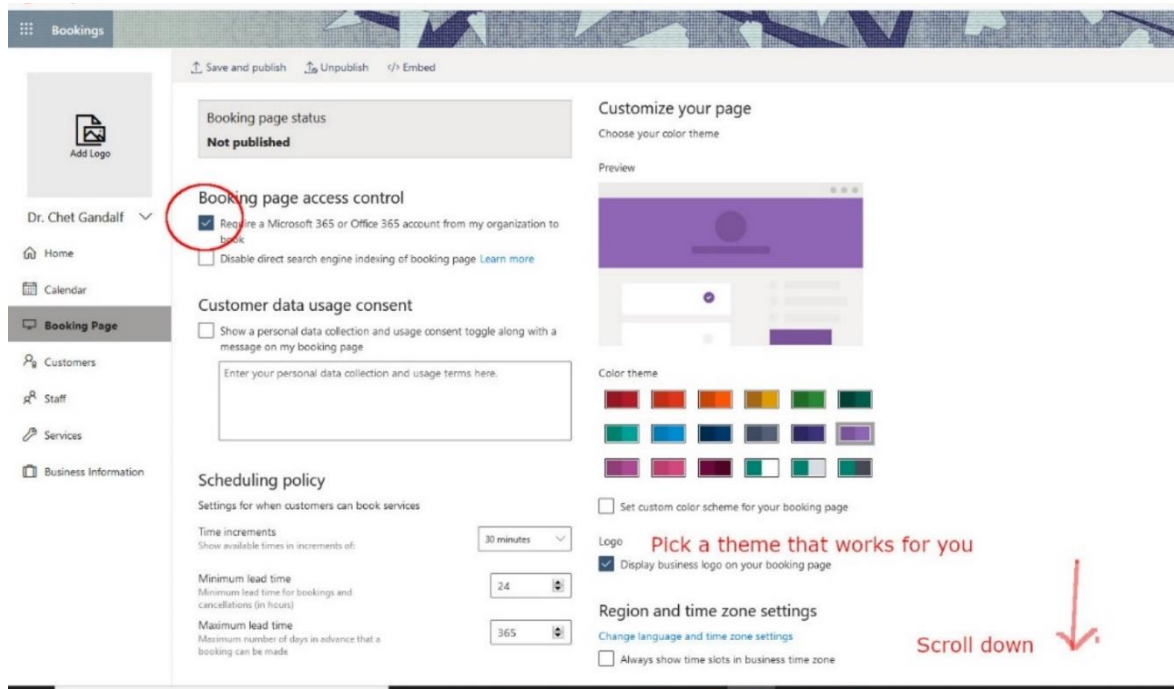
The screenshot shows the 'Manage services' interface. At the top, there is a '+ Add a service' button. Below this, the title 'Manage services' is followed by the subtitle 'Create and edit your bookable services'. A table lists the services:

Service	Duration	Default price	Assigned staff
Advising	1 hour	Price not set	No staff assigned
Initial consult	1 hour	Price not set	No staff assigned

The 'Initial consult' row is highlighted, and a delete button (trash icon) is circled in red. Below the table, a red text prompt says 'Delete the default 'Initial consult' service'. The 'Services' menu on the left is highlighted.

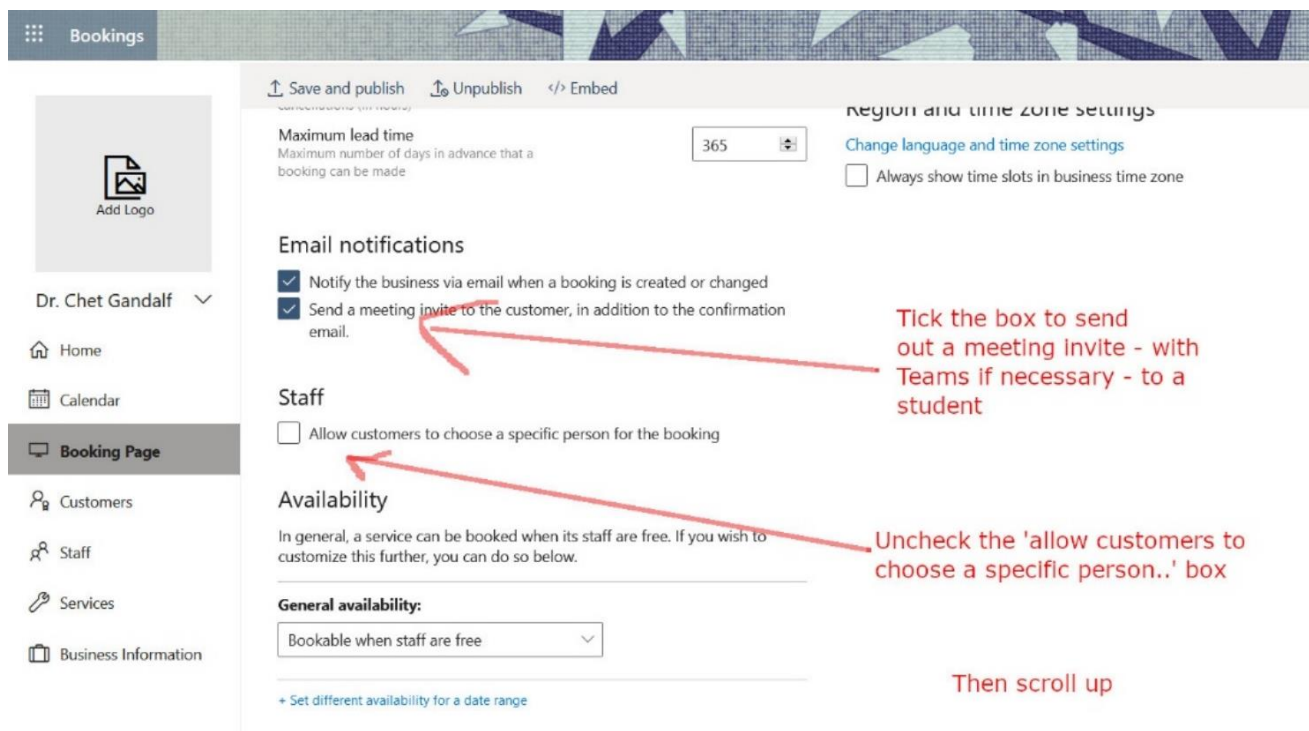
26. Now go to the Bookings Page area on the left-hand side of the page. Tick the first box under Bookings Page Access Control so that this bookings application is open to people at Hanover – that is, your students. You can pick a theme for the Booking page that you like.

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

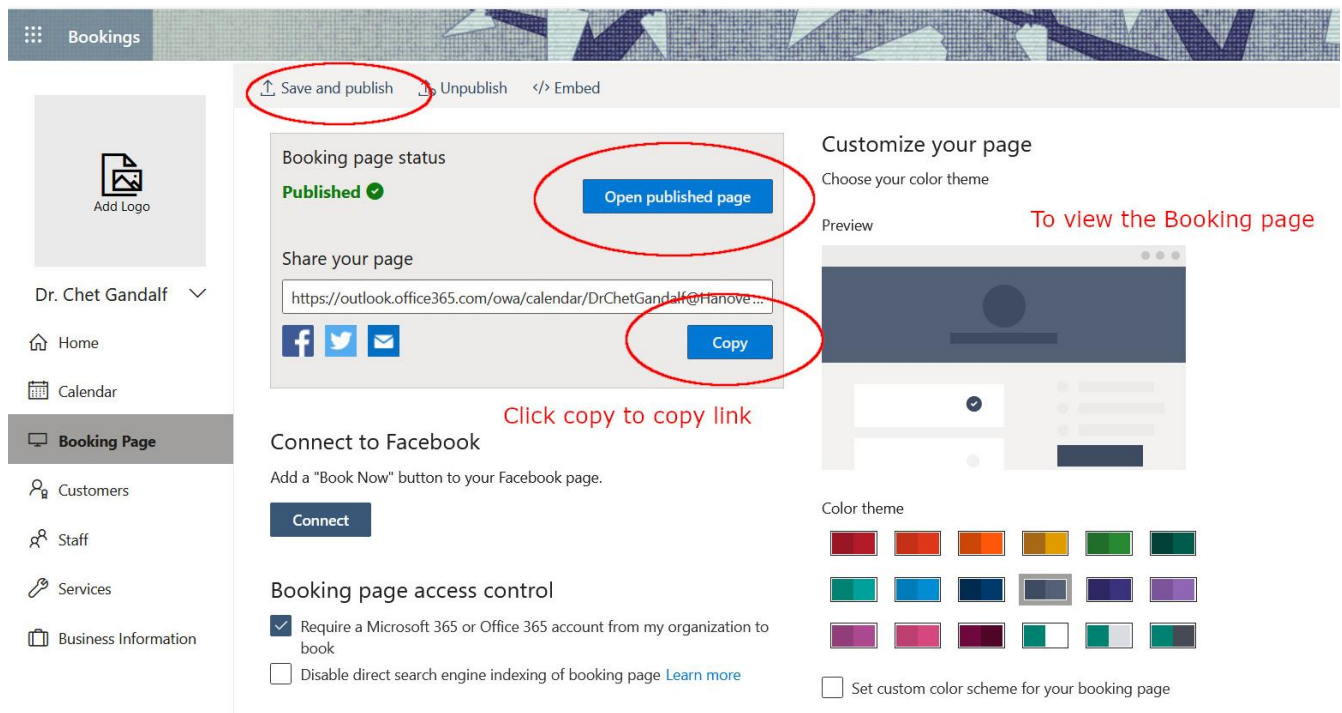


27. Make sure that the second notification for Send a Meeting is ticked, particularly if you are having a virtual meeting. This will send out a Teams invite and link so that the student can meet online.

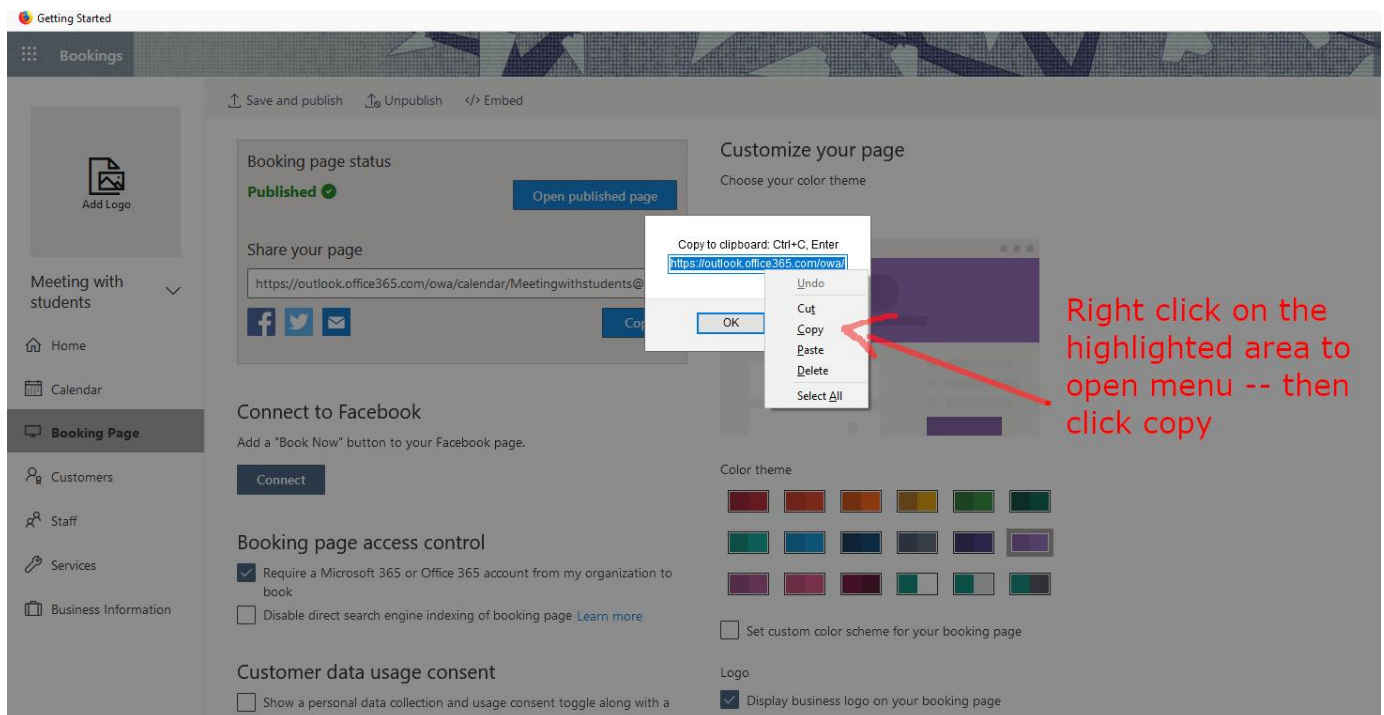
Uncheck the Allow Customers to Choose.... Tick box if you are not sharing a Bookings service page with colleagues.



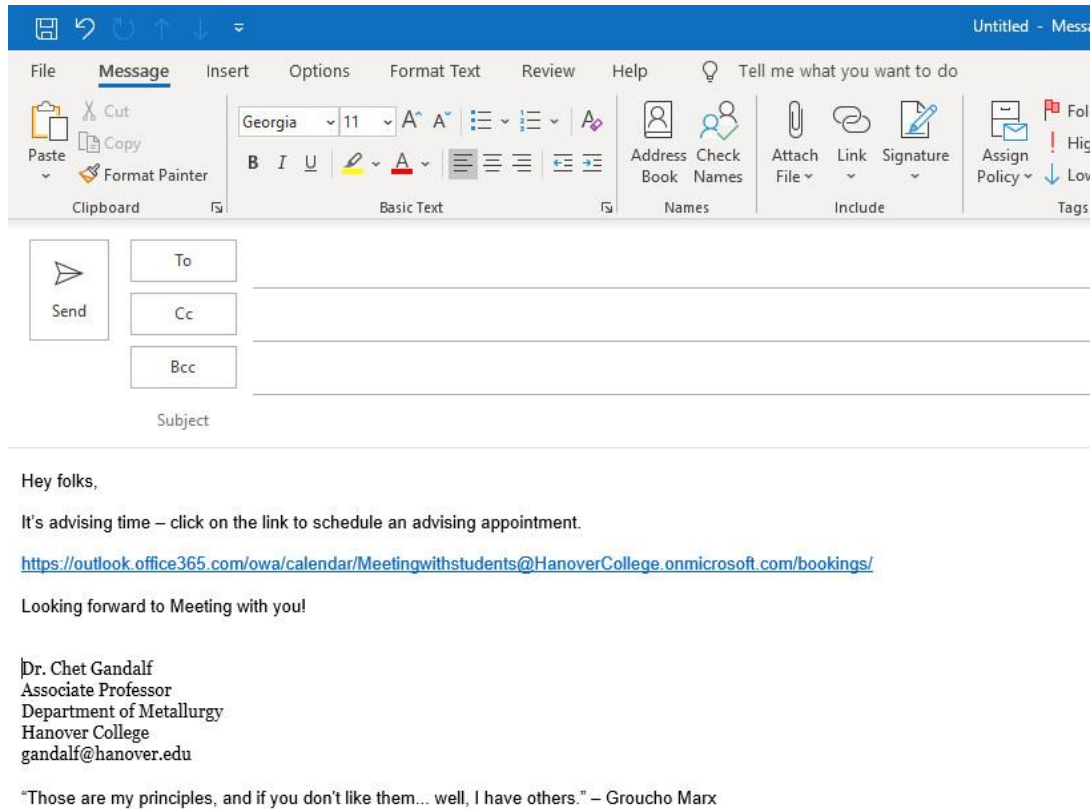
28. Click **Save and Publish**. If you want to view the bookings page, click on the Open Published Page. You can copy the link by clicking on the button and adding it to an e-mail or to a Moodle page.



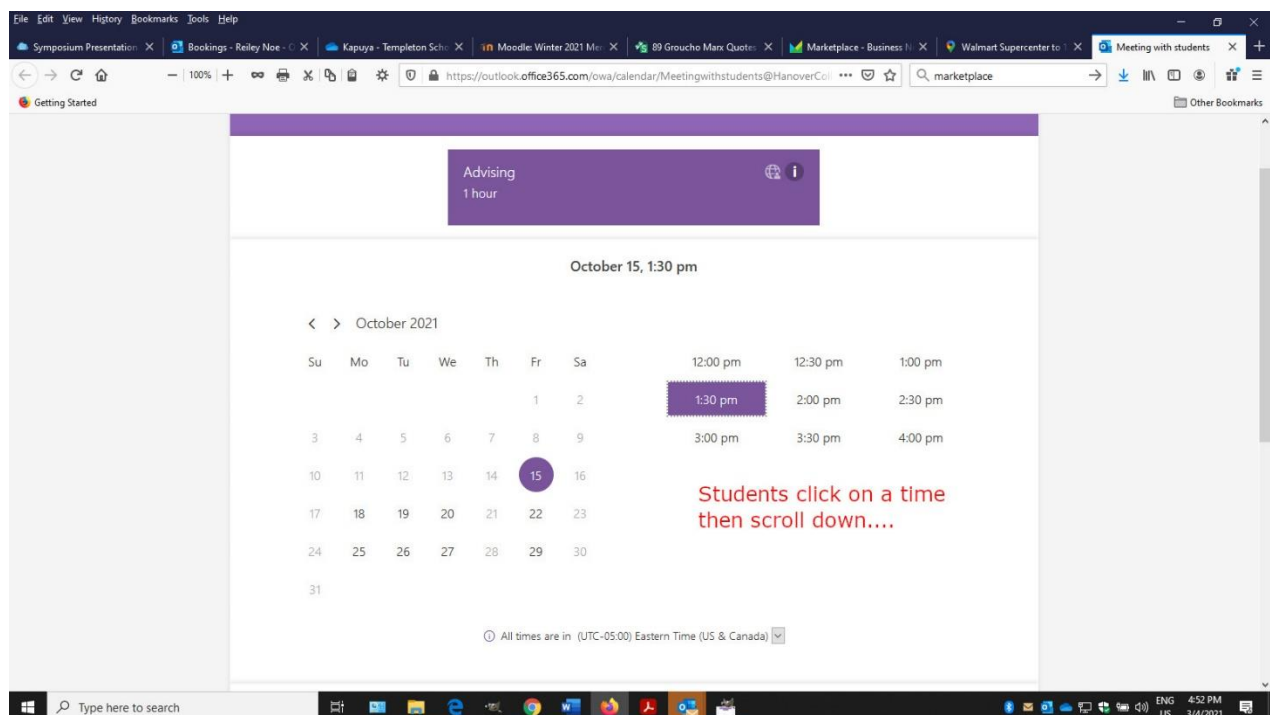
29. When you click Copy, you'll get this dialog box. Unlike other Microsoft Copy buttons, this does not automatically copy the link to the clipboard when you click it. You need to right click on the highlighted url and choose copy in the dialog box that appears.



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.



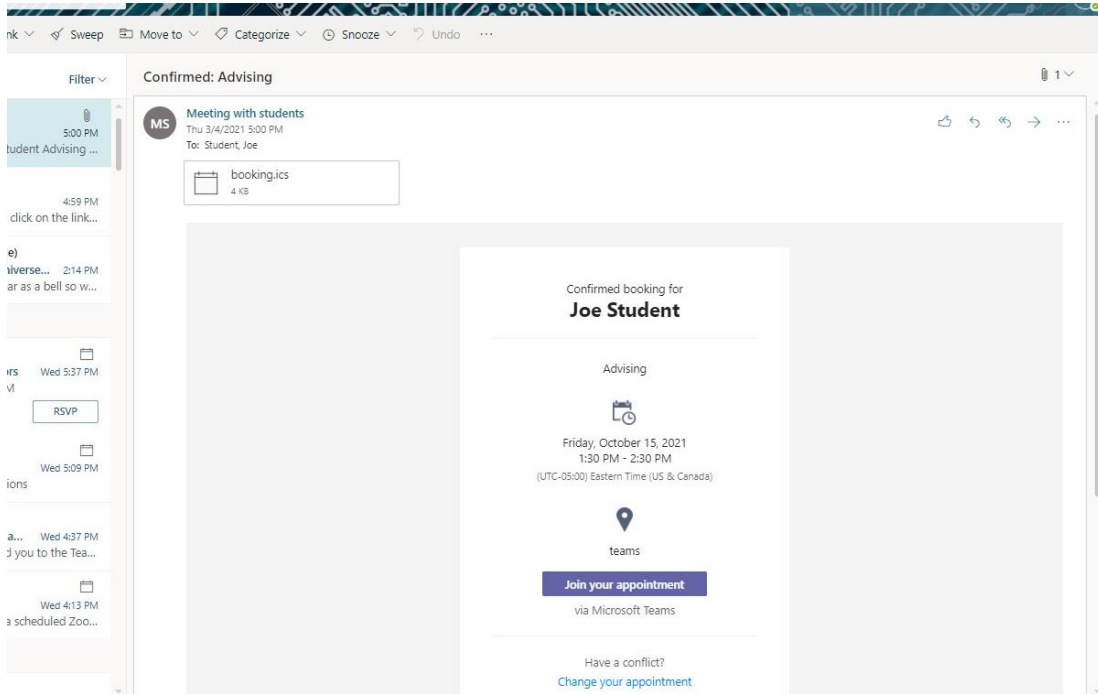
32. The student fills out their name and e-mail and other information. The two questions that we created appear below – the drop-down menu that will let them select the class that they are in, and the text question where they mention what they are interested in discussing. They click the Book button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

The screenshot shows a web browser window with the URL <https://outlook.office365.com/owa/calendar/Meetingwithstudents@HanoverColl>. The page displays a calendar for the month of May, with dates 24 through 31 visible. Below the calendar, there is a form titled "Add your details". The form includes input fields for "Name", "Email", "Phone number (optional)", and "Address (optional)". To the right of these fields, there is a section titled "This is where your questions will appear" with a text area for "Notes (optional)". A purple "Book" button is located at the bottom of the form. Red text annotations are present: "then fill out the form and click the button to book." points to the input fields, and "This is where your questions will appear" points to the notes section.

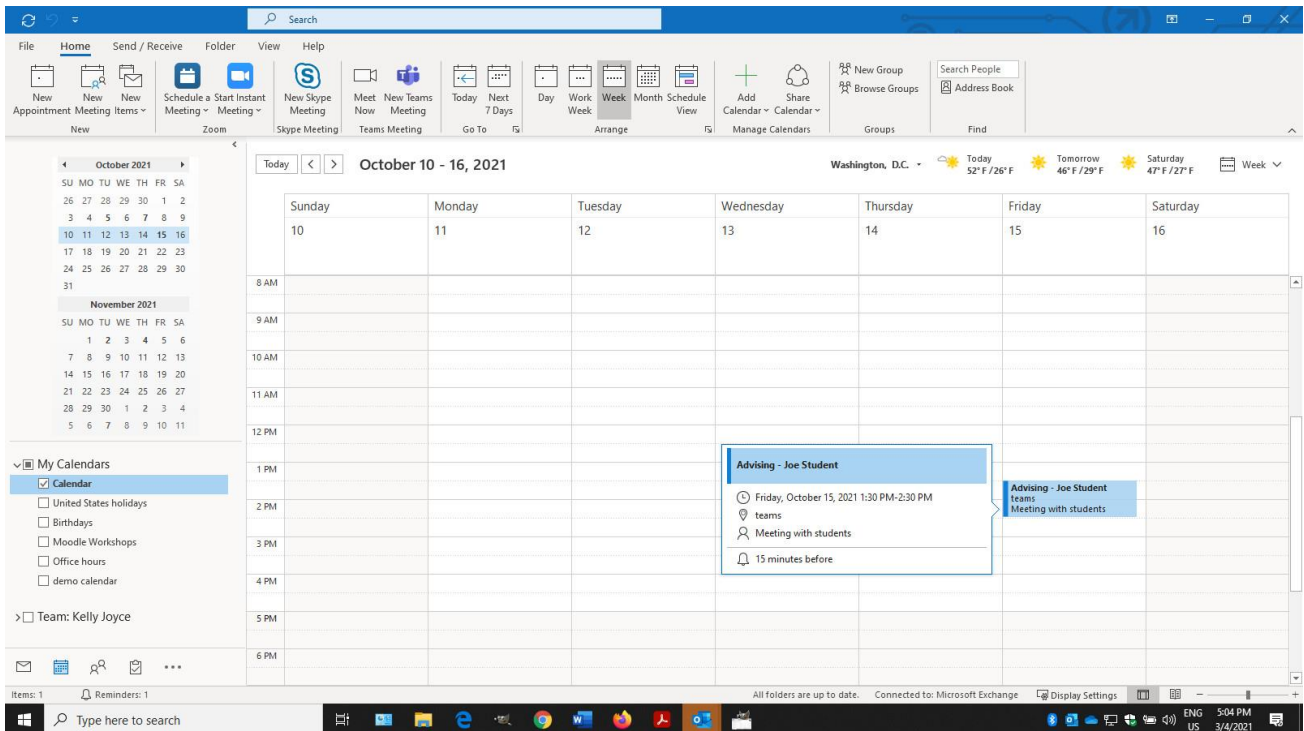
33. They receive a confirmation message.

The screenshot shows a confirmation message overlay on a calendar interface. The overlay is a white box with a purple border and contains the text: "Thank you for booking with us! You will get a confirmation message in email shortly". Below the text is a purple envelope icon and a purple "OK" button. The background is a dimmed view of the calendar from the previous screenshot, showing the same date range and form fields. The "Book" button is also visible at the bottom of the background form.

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.