

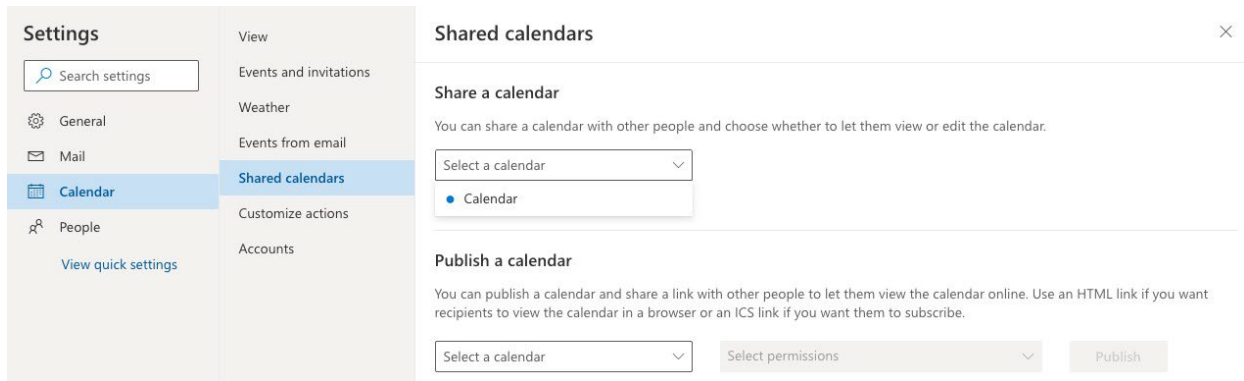
How to Use Bookings to schedule Academic Advising Appointments

This guide is for faculty/staff who want to block appointments on Outlook and then have Bookings book in those days/times.

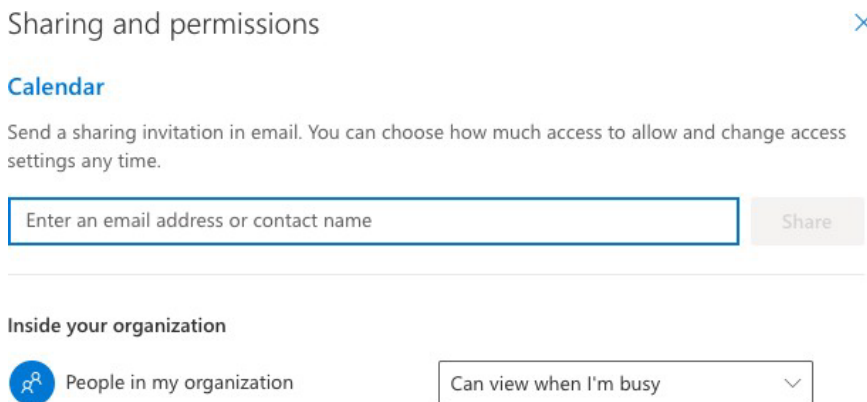
First a double check of how you share your calendar on Outlook:

Step 1. First open the following link and choose a calendar.

<https://outlook.office.com/mail/options/calendar/SharedCalendars>



Step 2. Select “Can view when I’m busy”.

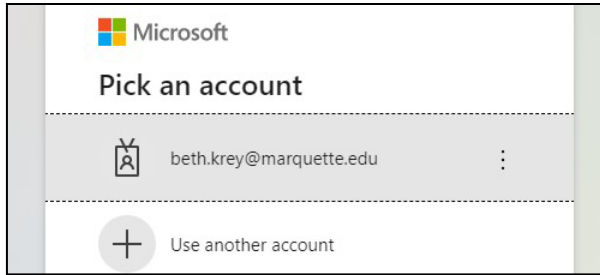


If the option was set to “Not shared”, no matter what, all timeslots were available on Bookings.

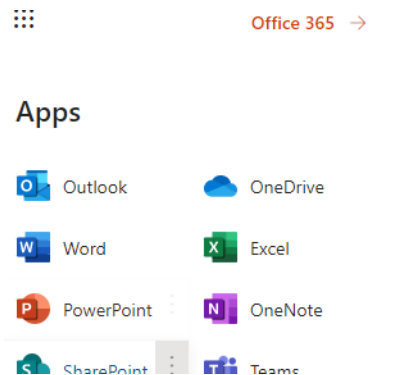
Step 3 (optional): Add all Advising Blocks of time onto your personal Outlook calendar to “save the times”. This would show bookings appointments next to the blocks you enter, which could get messy. If you choose to do this, take note of step 2 on page 5.

Now onto Bookings....

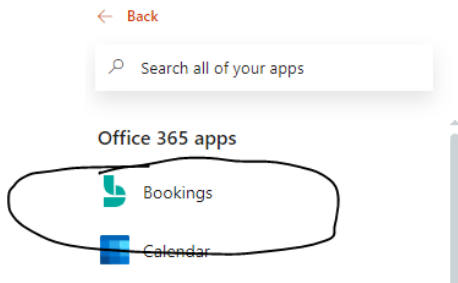
Log into your Office 365 page: <https://portal.office.com/>



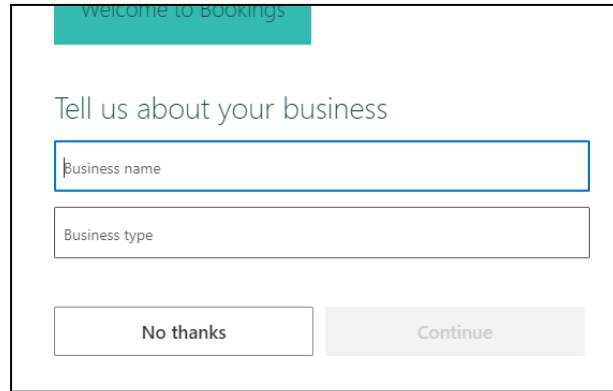
Add **Bookings** as one of your apps... select "All apps →" on the left side of the screen:



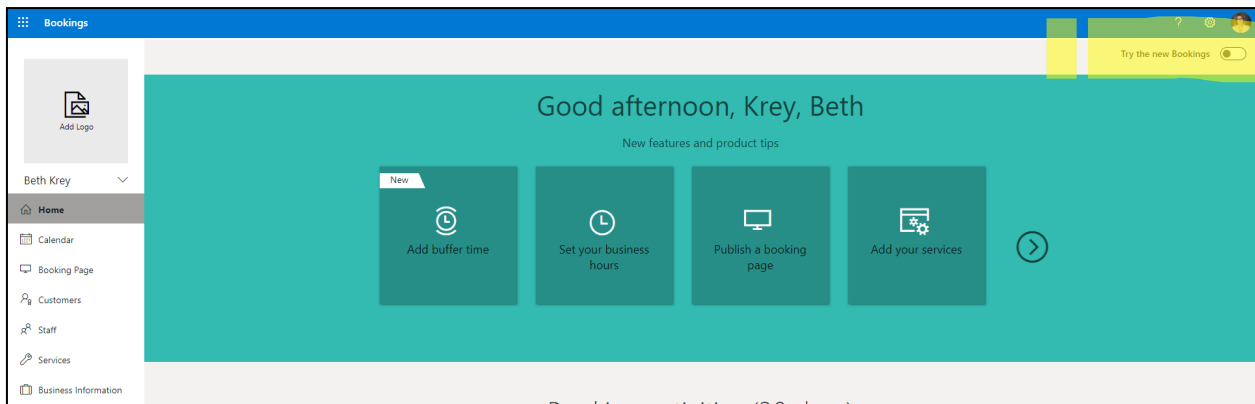
Select **Bookings**. If you do not have that just yet, click on **All Apps** and search for "**Bookings**"



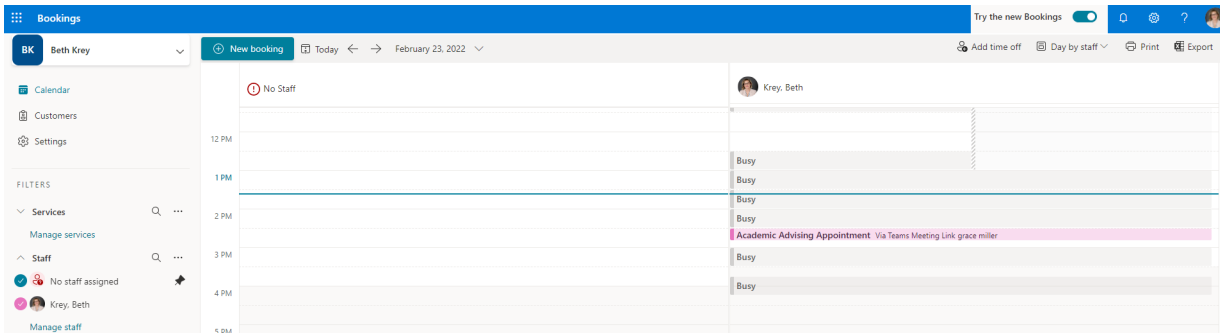
When you first access Bookings it will ask you the name of your organization – do NOT type Marquette University, instead **type your name of your calendar**. Examples: Ms. Beth Krey, Beth Krey or Professor Krey. This label request from Bookings may seem confusing as you might want to type Marquette, but this is the place to label what YOUR calendar will be called and what will show to students when they access your “Bookings Calendar”.



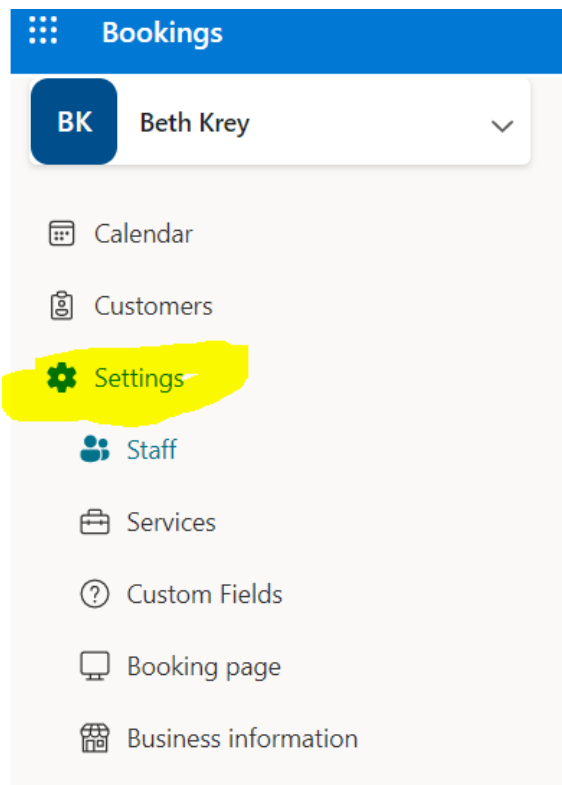
On the Bookings home page – be sure that **“Try the new Bookings”** is selected. Your main Bookings page should change from this:



To this (all other images throughout this guide are assuming you are using the NEW Bookings).



On the left toolbar there are great navigational tools – as we go through this session, all will be found through selecting **Settings** and you will adjust the **Staff, Services** and **Booking Page** tabs throughout this guide.



STAFF PAGE

On the **Staff** page you will need to add you to your calendar. This seems odd, but you will be creating a Bookings page to book YOU. Start by selecting **Add new staff**:



Within the **Staff page** – enter your contact information. Below that, make sure **“Notify the staff member via email when a booking assigned to them is created or changed”** is selected. This will share an email with you each time a student adds or cancels an appointment.

If you are blocking time on your calendar, make sure **“Events on Office calendar affect availability”** is **NOT** selected. This will ignore what is on your Outlook calendar and will allow bookings during the times you indicate, however it will still keep track of other appointments made through Bookings, but **NOT** Outlook.

Krey, Beth
KB ✓ Pink

beth.krey@marquette.edu Phone number

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

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.

Hours on the staff page should indicate your **“general limitations.”** We’ll setup your exact blocks in a future step, so you can basically ignore this. Feel free to setup basic working hours or if you are never available on Fridays for instance, hit the trash can to be “closed” on Fridays. Note hours entered here can conflict with the hours you setup in a next step, so be sure to check that this is not more restrictive.

Use business hours
Turn off business hours to edit availability

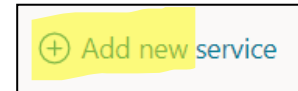
Monday	9:00 AM	3:30 PM	🗑️	+
Tuesday	9:00 AM	3:30 PM	🗑️	+
Wednesday	9:00 AM	3:30 PM	🗑️	+
Thursday	9:00 AM	3:30 PM	🗑️	+
Friday	9:00 AM	12:00 PM	🗑️	+
Saturday	Closed			+
Sunday	Closed			+

Click on **“Save Changes”** at the bottom of the page to complete.

Discard Save changes

SERVICES PAGE

This is where you will create the appointment framework. Click on **“Add new service”** or **“Add a service”**.



The example below is for a “20-minute Academic Advising Appointment,” just like you need for the academic advising period.

In the left pane as shown below, be sure the “Default scheduling options” switch remains off, and Publishing options is on.

Edit service

The screenshot shows the 'Edit service' interface. On the left is a sidebar with tabs: 'Basic details' (highlighted), 'Availability options', 'Assign staff', 'Custom fields', and 'Reminders and notifications'. Below these is a section for 'Default scheduling options' with a toggle switch turned off, and 'Publishing options' with a toggle switch turned on. The main area shows the service name 'Academic Advising Appointment', a description '20 minutes via Teams to discuss coursework.', a 'Via Teams Meeting Link' button, an 'Add online meeting' toggle switch turned on, a duration selector set to '0 days 0 h 20 min', a 'Buffer time' toggle switch turned off, and a price dropdown set to 'Free'.

First, click on the left tab **Basic Details**

Enter Service Name: **Academic Advising Appointment**

Enter Description: **20 minutes via Teams to discuss coursework.** If you want to add more here, you can. i.e. *Please have your PREP Module results and Graduation Checklist ready for the meeting.*

Location: Enter your office number as in-person is the default per college expectations. We will discuss how to adjust to Teams later on.

Turn off “add online meeting”

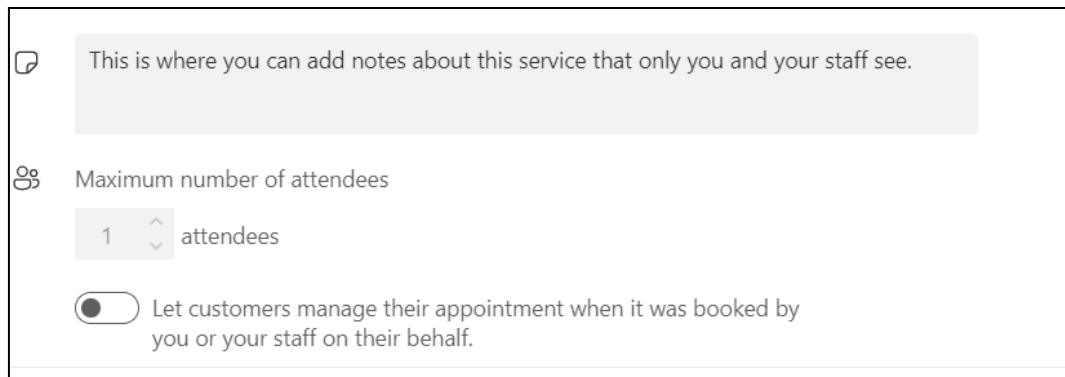
Duration “20 minutes”

We would recommend keeping the buffer time off, but if you want a buffer between meetings – add that. It will work better within an hour period to offer 20-minute appointments (3 total) without a buffer. But if you want a 5 minute break between meetings, note that.

Keep next line, the cost line: as “Free”

Remaining areas you should leave as is:

Notes: Blank, Maximum numbers of attendees” as 1, and the “Let customers manage their appointment when it was booked by you or your staff on their behalf” button should remain unselected.



This is where you can add notes about this service that only you and your staff see.

Maximum number of attendees

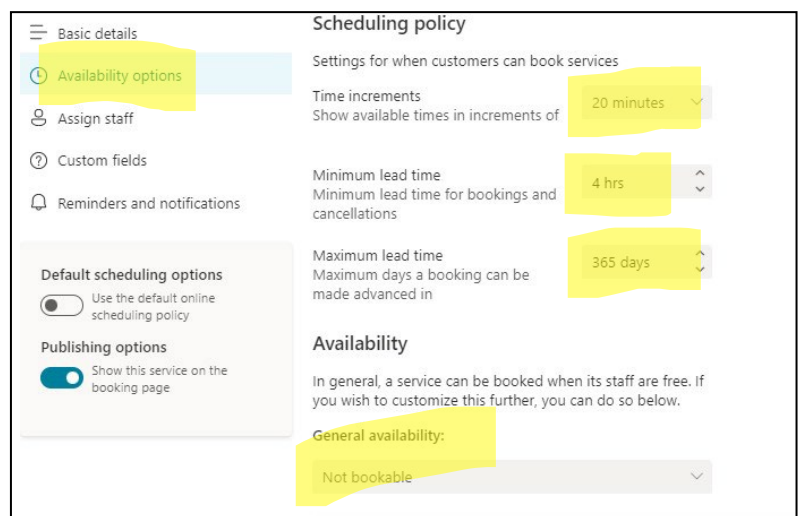
1 attendees

Let customers manage their appointment when it was booked by you or your staff on their behalf.

Within the **Availability options** tab on the left, you'll set your **Scheduling policy** and **Availability**

For the purposes of Academic Advising your appointments should be 20 minutes, and the minimum lead time should be no more than 12 hours to encourage flexibility. While students may want to sign up day-of, four hours will give you some time to plan ahead.

Recommend: adjust time increments as 20 minutes, a 4 hour minimum lead time, and leave the maximum lead time as 365 days.



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

Settings for when customers can book services

Time increments

Show available times in increments of 20 minutes

Minimum lead time

Minimum lead time for bookings and cancellations 4 hrs

Maximum lead time

Maximum days a booking can be made advanced in 365 days

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



Within **Availability** select “not bookable” in **General availability** because you only want to be bookable during the Academic Advising period.

Your **Availability during these dates** should be adjusted to the specific time blocks each day that you want students to select from. Perhaps that’s the same for both weeks, or you might have different days and times each week during your advising window.











If it's the same for both weeks:

- Select the start date and end date for your advising window.
- Select **“Custom hours”** and set each date as needed. This will assume for both weeks you are free on Monday from 10-12, Tuesday from 1-3 and Thursday from 9-11
- Use the + button to add a time block and “garbage can” to get rid of one.



Original image:

3/21/2022  4/1/2022 











Custom hours (recurring weekly)

Monday	9:00 AM	4:00 PM		
Tuesday	9:00 AM	4:00 PM		
Wednesday	9:00 AM	4:00 PM		
Thursday	9:00 AM	4:00 PM		
Friday	9:00 AM	3:30 PM		

After adjusting:



Start: 3/21/2022  End (inclusive): 4/1/2022 

Custom hours (recurring weekly)











Monday	10:00 AM	2:00 PM		
Tuesday	1:00 PM	3:00 PM		
Wednesday	Not bookable			
Thursday	9:00 AM	11:00 AM		
Friday	Not bookable			



If you have different blocks each week:

- First week should be: Start date and end date for week 1 of your advising window
- Select **“Custom hours”** and set each date as needed that week. Use the + button to add a time block and “garbage can” to get rid of one.
- Click on **Set different availability for a date range** and add in the second week of advising start and end dates.











3/21/2022  3/25/2022 

Custom hours (recurring weekly)

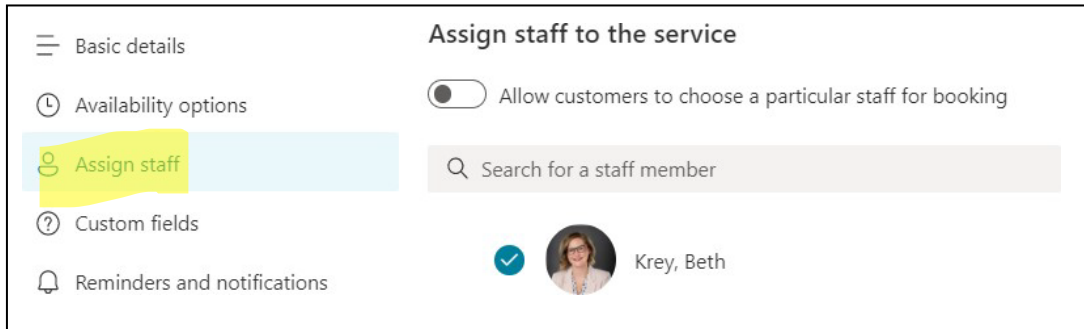
Monday	10:00 AM	2:00 PM		
Tuesday	1:00 PM	3:00 PM		
Wednesday	Not bookable			
Thursday	9:00 AM	11:00 AM		
Friday	Not bookable			

3/28/2022  4/1/2022 

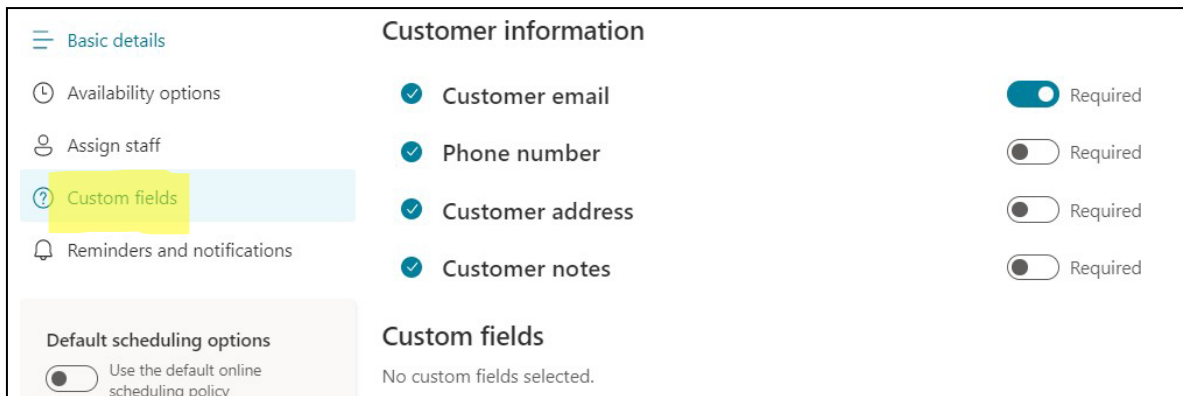
Custom hours (recurring weekly)

Monday	2:00 PM	4:00 PM		
Tuesday	Not bookable			
Wednesday	9:00 AM	12:00 PM		
Thursday	Not bookable			
Friday	9:00 AM	1:00 PM		

Within the **Assign staff** tab, make sure you are assigned to the service, and “allow customers to choose...” is switched off



Within the **Custom fields** tab, leave as is:



Within the **Reminders and notifications** tab you will adjust a few areas:

The screenshot shows the 'Reminders and notifications' settings page. On the left is a sidebar with navigation options: 'Basic details', 'Availability options', 'Assign staff', 'Custom fields', and 'Reminders and notifications' (highlighted). The main content area is divided into three sections:

- Email and SMS notifications:** Contains three checkboxes. The first, 'Notify the business via email when a booking is created or changed', is checked. The other two, 'Send a meeting invite to the customer, in addition to the confirmation email' and 'Enable text message notifications for your customer', are unchecked.
- Additional information for email confirmation:** Features a rich text editor with a toolbar. The text area contains the message: 'In advance of our scheduled meeting please complete the [PREP Module](#). Please come to your appointment with your PREP Module results email AND your current Graduation Checklist PDF. (How to find your Graduation Checklist) Review AdvisingCentral: <https://www.marquette.edu/business/undergraduate/advising-central.php>'.
- Reminders and confirmations:** Includes a '+ Add an email reminder' button and a list of reminders. One reminder is shown, set for '2 hours before' with the text 'Reminder that you have an appointment!'.

At the bottom right, there are 'Discard' and 'Save changes' buttons.

For **Email and SMS notifications** select that you want to be notified when an appointment is created or changed. If you are getting two emails for each booking, you may want to come back and uncheck this, since the Staff page is already “sending” you one. You can enable the meeting invite too if you’d like, students can choose to use or ignore it.

Within the next area **Additional Information for Email Confirmation**, this is where to add information about what you want from them for the appointment. These details are what is shared in the Email Confirmation about the appointment. You can edit anything here. You can also set up additional email reminders to students.

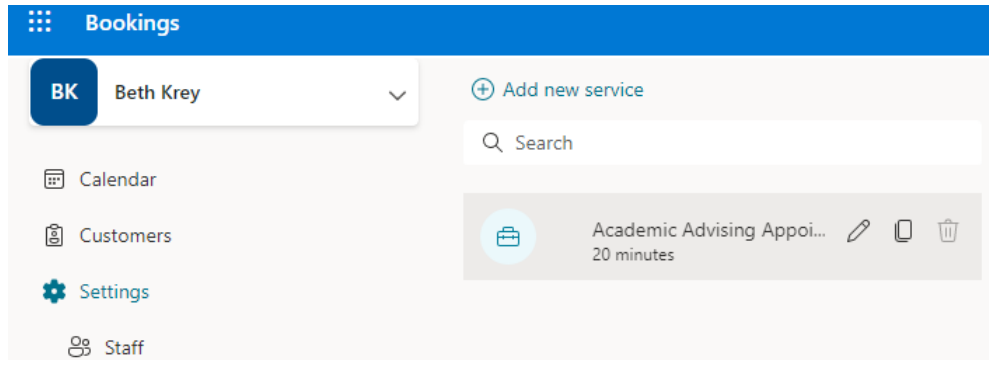
Currently I have this message in this area – you can feel free to copy and paste:

*In advance of our scheduled meeting please complete the [PREP Module](#)
Please come to your appointment with your PREP Module results email AND your current
Graduation Checklist PDF. (How to find your Graduation Checklist)
Review AdvisingCentral: <https://www.marquette.edu/business/undergraduate/advising-central.php>*

Under **Reminders and Confirmations** the system will auto send two reminders the day before an appointment. It’s recommended you remove the “We look forward to seeing you!” reminder and keep only “Reminder that you have an appointment!” set for 2 hours before the appointment. If there is nothing in this area, you can add a reminder email as desired.

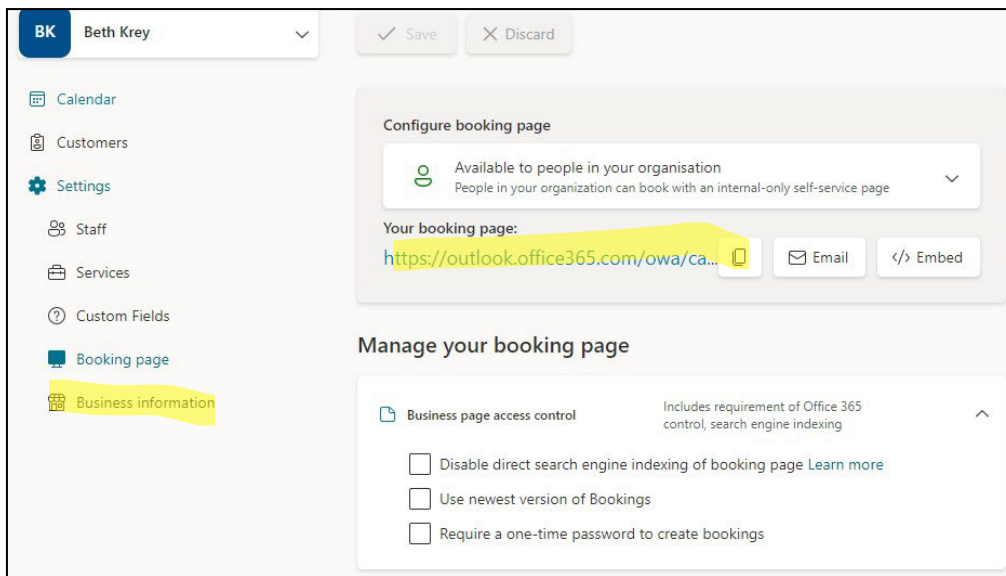
Finally click **Save changes** at the bottom of the screen.

And after fully saving my “Services” page looks like this:



BOOKING PAGE

The start of the page is straightforward.



Your booking page is your personal link that you can share and that students will use to book appointments. This is the “Bookings Link” you need to send to Sara by the deadline.

Under “Business page access control” check “Disable direct search engine indexing”

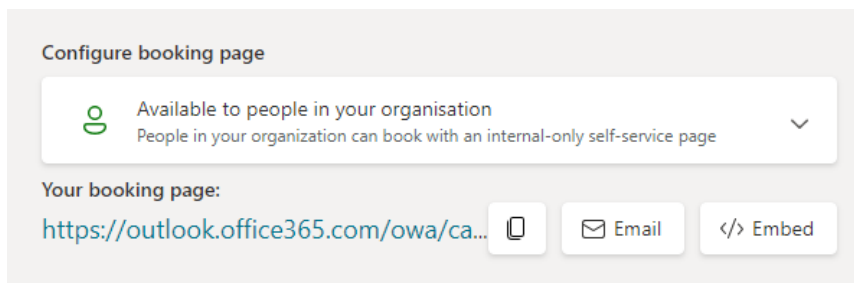
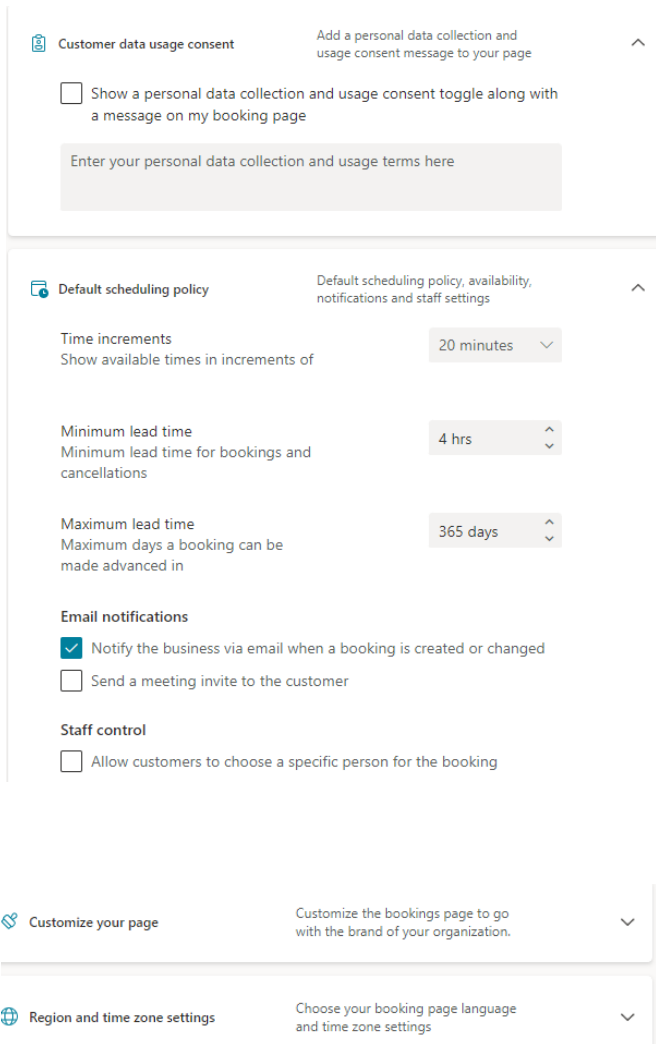
Do not select anything within **Customer data usage content**

You can ignore **Default scheduling policy** as we switched this off on the services tab. No need to enter info again.

You can customize a few other things such as colors. Please also check that Central Time (US & Canada) is selected under “region and time zone settings”

Once it’s all set, click **Save and Publish** at the top of the page.

Before you totally exit, copy the **Your booking page** link near the top of this page. That’s your personal page link that students will use to book appointments with you.



Review this link to see what students see... do you see meeting dates there? Poke around a bit to see if your open time blocks on your current Outlook calendar show up for the timeframes and dates you set.



Once all set, send your Bookings Calendar link to Sara.Koenig@Marquette.edu.

Here's mine:

<https://outlook.office365.com/owa/calendar/BethKrey@marquette.edu/bookings/>

If you click on your link it will show what your students will see:

Beth Krey


Academic Advising Appointment  

20 minutes
Free

March 21

< > March 2022

Su	Mo	Tu	We	Th	Fr	Sa	9:00 am	9:20 am	9:40 am
		1	2	3	4	5	10:00 am	10:20 am	10:40 am
6	7	8	9	10	11	12	2:00 pm	2:20 pm	2:40 pm
13	14	15	16	17	18	19	3:00 pm		
20	21	22	23	24	25	26			
27	28	29	30	31					

 All times are in (UTC-06:00) Central Time (US & Canada) ▼

Add your details

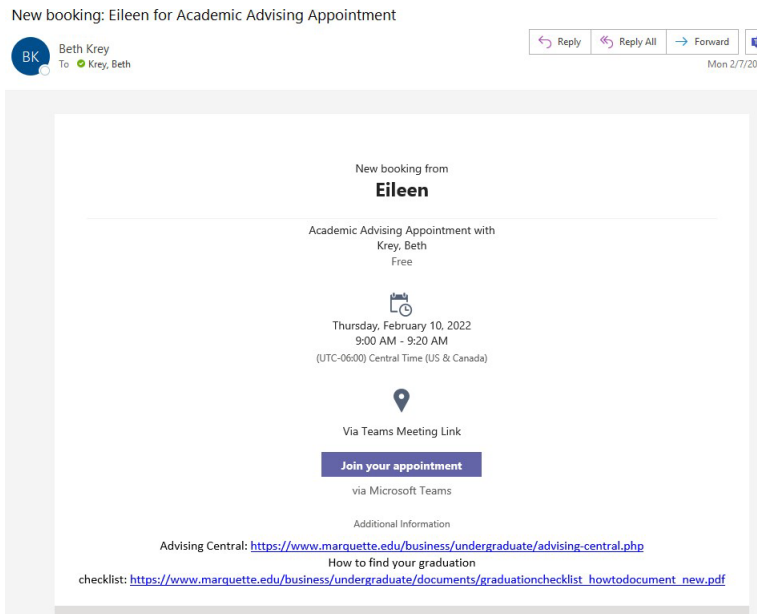
Name

Email

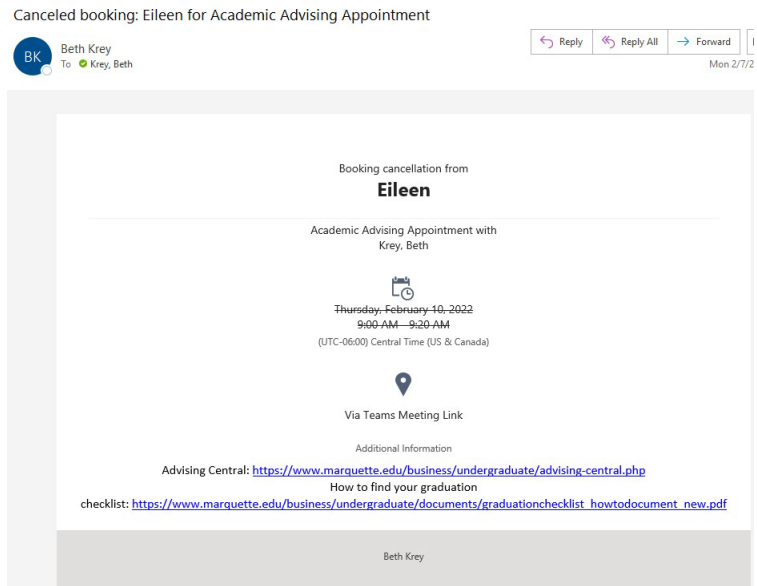
Please let us know if you have any special requests.
Thank you.

Notes (optional)

Here's what comes through to your email once someone books (and it makes an outlook meeting request on your calendar):



If cancelled, this is what you receive:



If a student needs to cancel, they can use the reschedule or cancel link in their confirmation email. If they lost the confirmation email, you can cancel the appointment for them and ask them to make a new one on your Bookings page.

As a host, you can cancel an appointment that's been made, but you will have to go into your Bookings app, and on the "Calendar" you can cancel.

This is the best way to be sure the time comes back as open, if you delete in Outlook along, it may not release this time.

The screenshot displays a web-based booking management system. The interface includes a top navigation bar with the title "Bookings" and a left sidebar with menu items: "Add Logo", "Beth Krey", "Home", "Calendar", "Booking Page", "Customers", "Staff", "Services", and "Business Information". The main area shows a calendar for "February 10, 2022" with a time slot from 7 AM to 4 PM. A booking is scheduled for "Thu 2/10/2022 9:00 AM - 9:20 AM" for "Connor Kaplan" via a "Teams Meeting Link". A modal dialog box titled "Cancel this booking?" is open, containing the text: "If you cancel this booking, a cancellation message will be sent to the customer(s) and staff. Email message to customer". Below the text is an input field, a blue "Cancel Booking" button, and a "Back" button. The background calendar shows a "No Staff" warning and a "Krey, Beth" staff assignment for the time slot.