

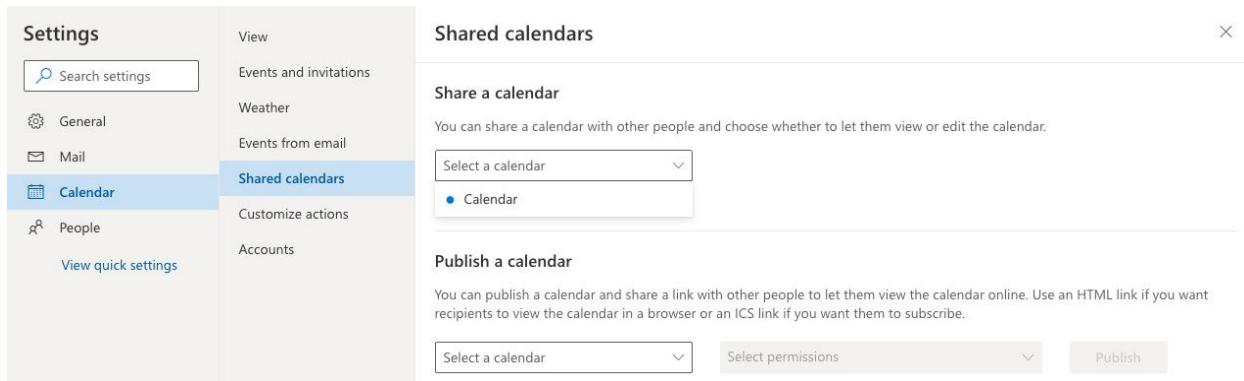
How to Use Bookings to schedule Academic Advising Appointments

This guide is for faculty/staff who want to use Bookings to pull from their calendar and allow students to book an appointment when free, with certain limitations I can set.

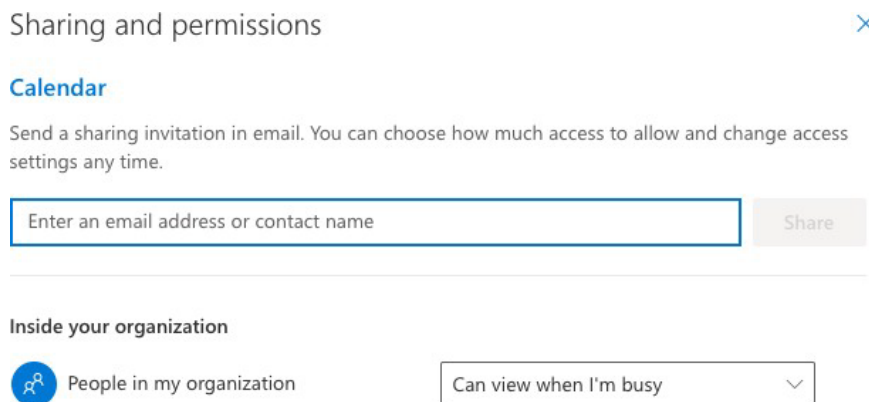
First a double check of how you share your calendar on Outlook:

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”.



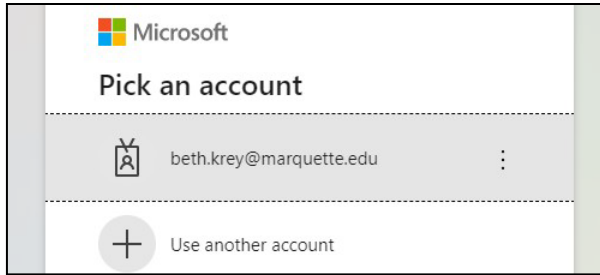
If the option was set to “Not shared”, no matter what, all timeslots were available on Bookings.

Look at your calendar and make sure classes, meetings, and other commitments are entered during the advising weeks. Do not “block off” times for advising.

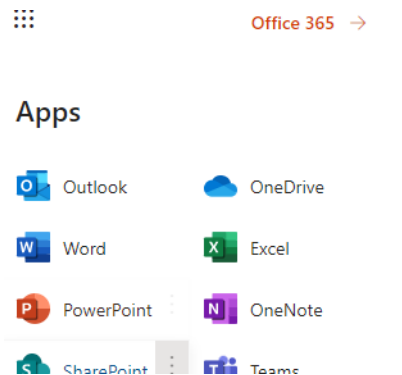
Please also check your Office 365 time zone is set to Central Time (US) by clicking the gear icon, and going to language and region settings.

Now onto Bookings....

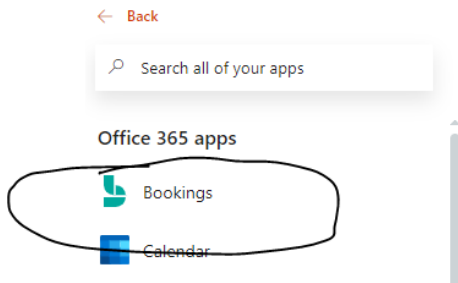
Log into your Office 365 page: <https://portal.office.com/>



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”.

welcome to Bookings

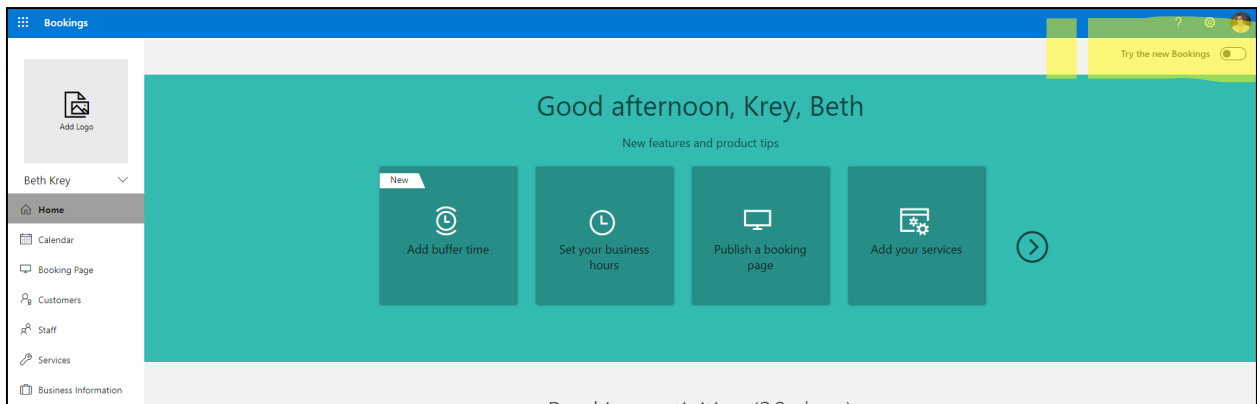
Tell us about your business

Business name

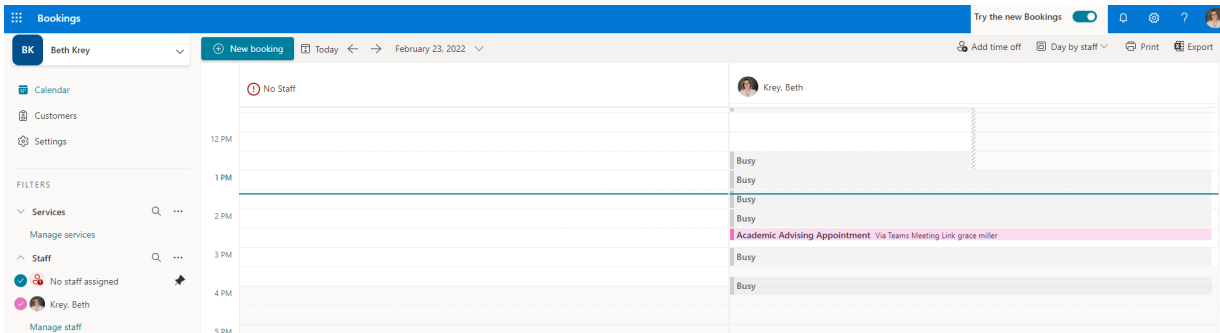
Business type

No thanks Continue

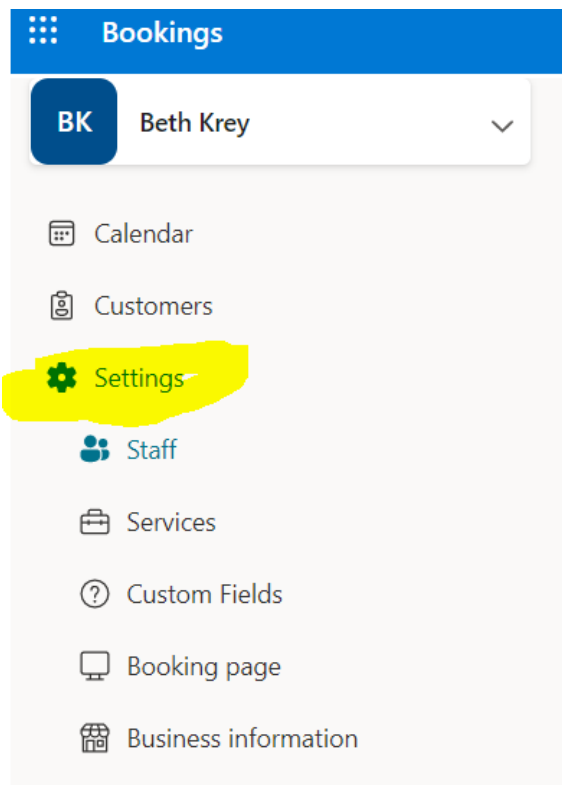
On the Bookings home page – be sure that **Try the new Bookings is selected**. Your main Bookings page should change from this:



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.

Also make sure **“Events on Office calendar affect availability”** is selected. This will use your current Outlook schedule to show availability in that exact moment as a student is trying to schedule an appointment.

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.

The hours area here **can be ignored if you want to setup advising time windows. You only need to adjust this if you want to be available for advising anytime you are free during “business hours.”** For example, I would only accept meetings for Advising between 9:00-3:30. I won’t ever be free before 9 a.m. for an Advising meeting, even if my calendar is open. So, think of this area as your “general limitations”. If you say you are generally available at 9 a.m., but have a different meeting already booked at that time, students cannot double book you.

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		+

You can use the “+” button to even make things more granular... say you don’t want students ever from 1:00-3:30 p.m., you can divide a day into increments:

Monday

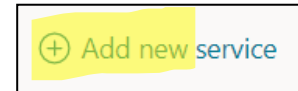
9:00 AM	1:00 PM	×
3:30 PM	5:00 PM	+

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.

Edit service

The screenshot shows the 'Edit service' interface. On the left is a navigation menu with 'Basic details' selected. The main area shows the service name 'Academic Advising Appointment', description '20 minutes via Teams to discuss coursework.', and a toggle for 'Add online meeting' which is turned on. The duration is set to 0 days, 0 hours, and 20 minutes. There is also a 'Buffer time' toggle which is 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. Per college expectations, Teams meetings are only if a student is sick etc.

“Add online meeting”: You can toggle this to ON if you want this to be **all** online meetings vs. in-person. All students will get a teams link then.

Duration “20 minutes”

We recommend you leave buffers off. 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, add one at either the start or end, not both.

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.

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 period of time you are seeking to host appointments. If you want to setup specific advising time blocks, choose “custom hours” and setup your time blocks (see p. 5) if you are doing different hours for the second advising week, you may add another week by pressing + set different availability for a date range. **Please beware this availability may conflict with the availability set under your staff page, one does not override the other.** If, as discussed on the staff tab, you want to be

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

Availability during these dates:

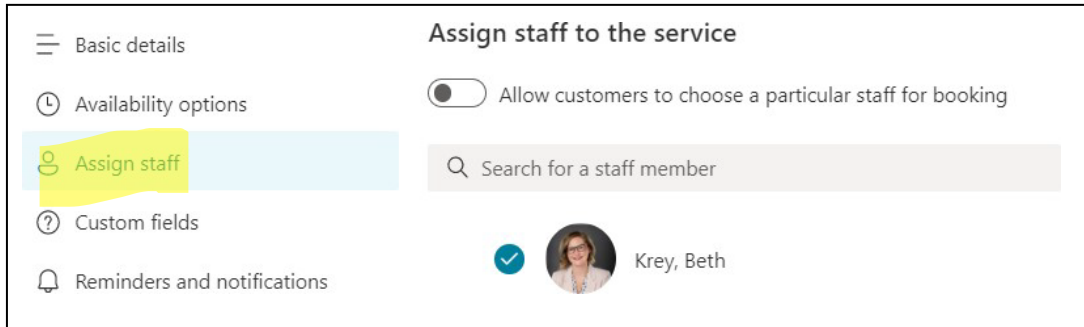
Start 3/21/2022

End (inclusive) 4/1/2022

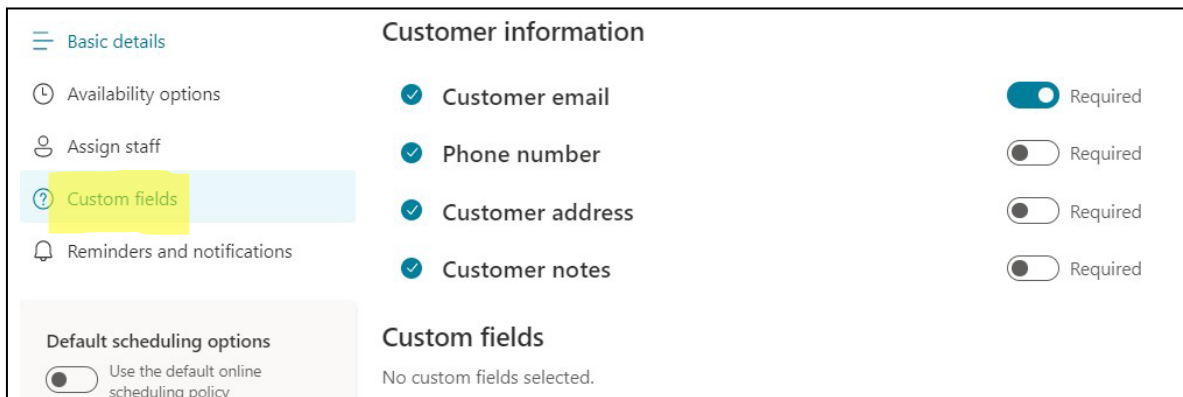
Bookable when staff are free

available anytime during your business hours, you can simply select “bookable when staff are free” and set the date range for advising weeks.

Within the **Assign staff** tab, make sure you are assigned to the service (check next to your name) and make sure “allow customers to choose” is turned 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 sidebar, there are sections for 'Default scheduling options' (toggle OFF) and 'Publishing options' (toggle ON). The main content area is divided into three sections: 'Email and SMS notifications', 'Additional information for email confirmation', and 'Reminders and confirmations'. The 'Email and SMS notifications' section has three checkboxes: 'Notify the business via email when a booking is created or changed' (checked), 'Send a meeting invite to the customer, in addition to the confirmation email' (unchecked), and 'Enable text message notifications for your customer' (unchecked). The 'Additional information for email confirmation' section features a rich text editor with a toolbar and a text area containing 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'. The 'Reminders and confirmations' section has a '+ Add an email reminder' button and a list of reminders, including one 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.

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.

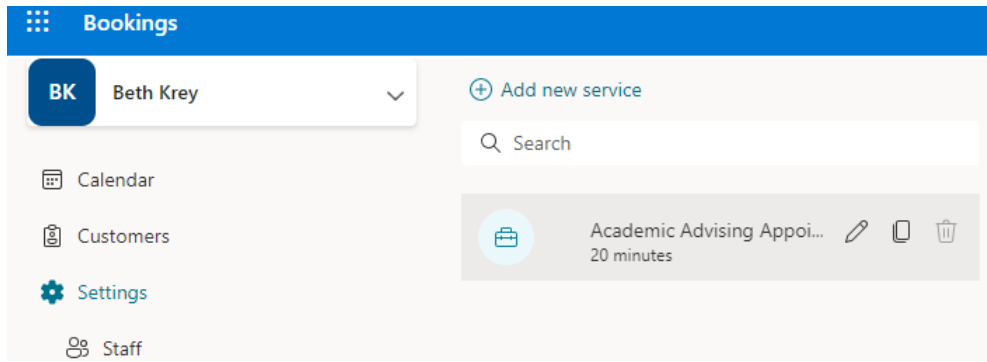
Currently I have this message in this area – you can feel free to copy and paste:

*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>*

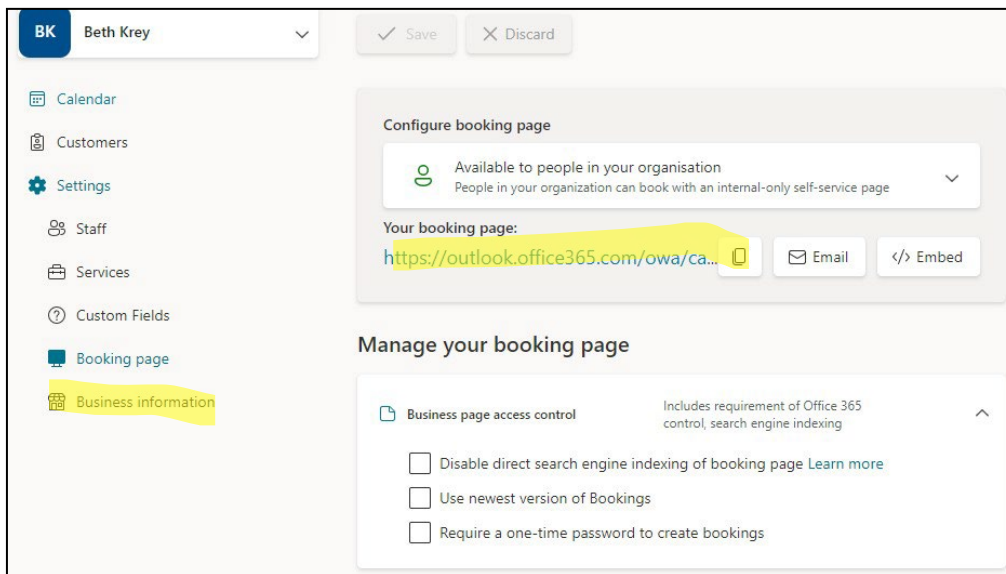
Under **Reminders and Confirmations** the system will auto send two reminders the day before an appointment. It's recommended you remove the "We look forward to seeing you!" reminder and keep only "Reminder that you have an appointment!" set for 2 hours before the appointment.

On the left keep the **Default Scheduling options** switch **OFF** And for **Publishing options** turn ON "Show this service on the booking page". Finally click **Save changes** at the bottom of the screen.

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



BOOKING PAGE



Your booking page is your personal link that you can share and that students will use to book appointments.

There are a few final settings pertaining to the bookings page. Disable search engine indexing as shown on the next page and verify your time zone. Everything else here can be ignored.

Configure booking page



Available to people in your organization

People in your organization can book with an internal-only self-service page



Your booking page:

<https://outlook.office365.com/owa/ca...>



Email

</> Embed

Manage your booking page



Business page access control

Includes requirement of Office 365 control, search engine indexing



Disable direct search engine indexing of booking page [Learn more](#)



Require a one-time password to create bookings



Customer data usage consent

Add a personal data collection and usage consent message to your page



Default scheduling policy

Default scheduling policy, availability, notifications and staff settings



Customize your page

Customize the bookings page to go with the brand of your organization.



Region and time zone settings

Choose your booking page language and time zone settings



Language

English (United States)

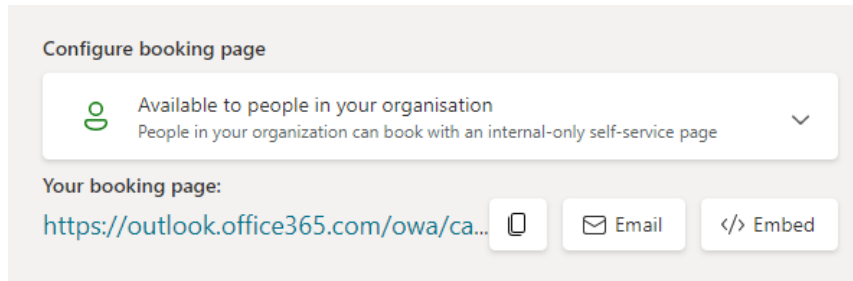
Current time zone

(UTC-06:00) Central Time (U...



Always show time slots in business time zone

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):

New booking: Eileen for Academic Advising Appointment


BK Beth Krey
To Krey, Beth


Reply Reply All Forward

Mon 2/7/22

New booking from
Eileen

Academic Advising Appointment with
Krey, Beth
Free


Thursday, February 10, 2022
9:00 AM - 9:20 AM
(UTC-06:00) Central Time (US & Canada)


Via Teams Meeting Link

Join your appointment
via Microsoft Teams

Additional Information
Advising Central: <https://www.marquette.edu/business/undergraduate/advising-central.php>
How to find your graduation
checklist: https://www.marquette.edu/business/undergraduate/documents/graduationchecklist_howtodocument_new.pdf

If cancelled, this is what you receive:

Canceled booking: Eileen for Academic Advising Appointment


BK Beth Krey
To Krey, Beth


Reply Reply All Forward

Mon 2/7/22

Booking cancellation from
Eileen

Academic Advising Appointment with
Krey, Beth


~~Thursday, February 10, 2022~~
~~9:00 AM - 9:20 AM~~
(UTC-06:00) Central Time (US & Canada)


Via Teams Meeting Link

Additional Information
Advising Central: <https://www.marquette.edu/business/undergraduate/advising-central.php>
How to find your graduation
checklist: https://www.marquette.edu/business/undergraduate/documents/graduationchecklist_howtodocument_new.pdf

Beth Krey

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

The screenshot displays the Microsoft Bookings application interface. At the top, the title bar reads "Bookings" and includes navigation options like "New booking", "Time off", and "Print". The main area shows a calendar for "February 10, 2022". A purple appointment is scheduled for "Thu 2/10/2022 9:00 AM - 9:20 AM" with the customer "Connor Kaplan" and the service "Via Teams Meeting Link". A dialog box titled "Cancel this booking?" is open over the appointment, 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 left sidebar shows navigation options: "Add Logo", "Beth Krey", "Home", "Calendar", "Booking Page", "Customers", "Staff", "Services", and "Business Information". The right sidebar shows "Try the new Bookings" and view options: "Day", "Work week", "Week", "Month", and "Today".