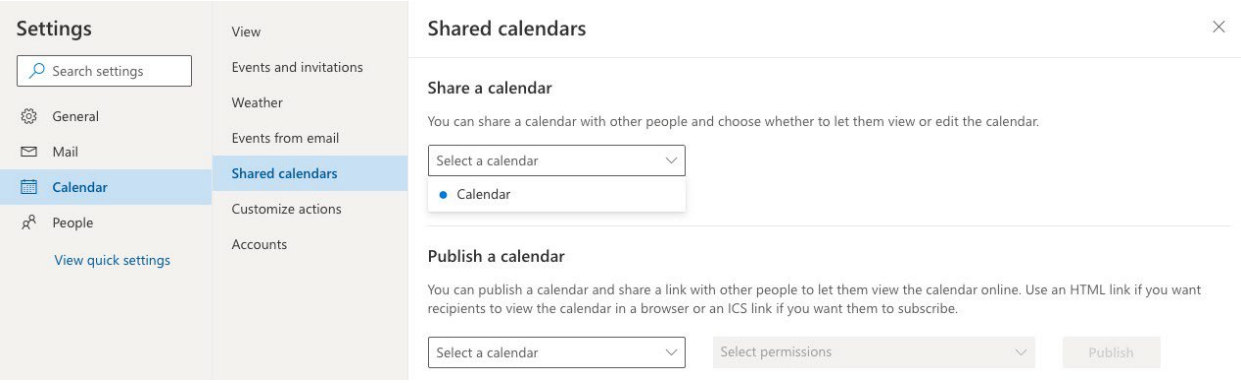
How to Use Bookings to schedule Academic Advising Appointments

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.

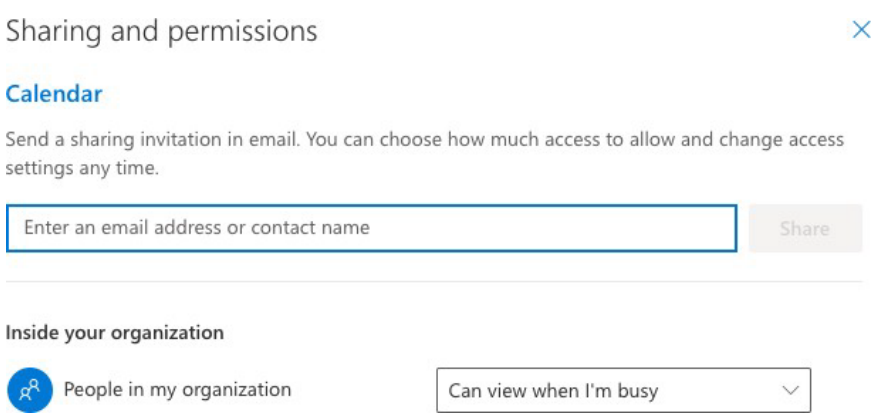
First a double check of how you share your calendar on Outlook:

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".



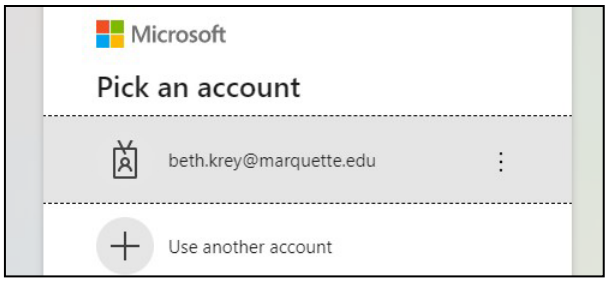
If the option was set to "Not shared", no matter what, all timeslots were available on Bookings.

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.

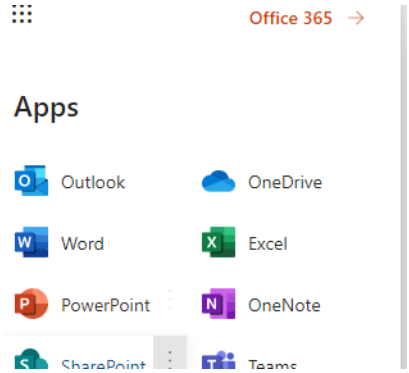
Please also check your Office 365 time zone is set to Central Time (US) by clicking the gear icon, and going to language and region settings.

Now onto Bookings….

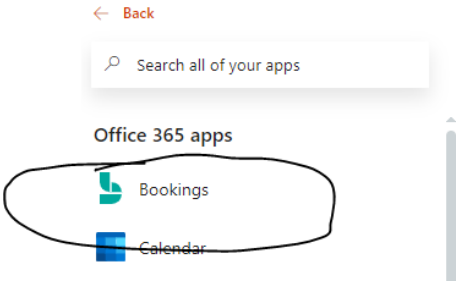
Log into your Office 365 page: https://portal.office.com/



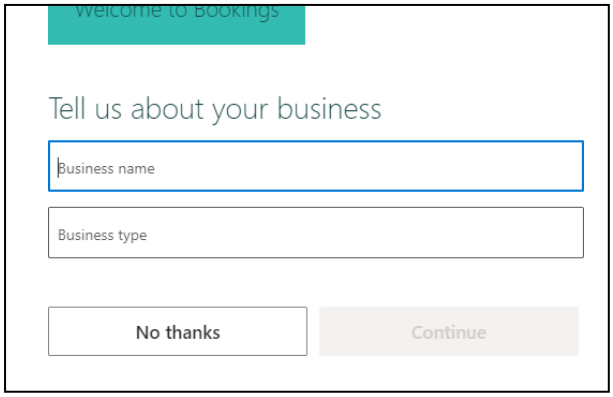
Add **Bookings** as one of your apps… select "All apps →" on the left side of the screen:



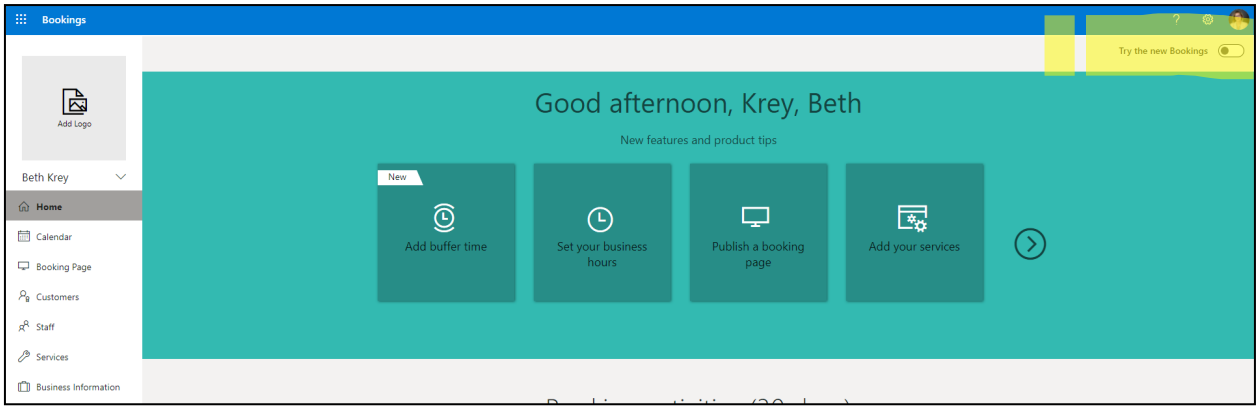
Select **Bookings**. If you do not have that just yet, click on **All Apps** and search for **"Bookings"**



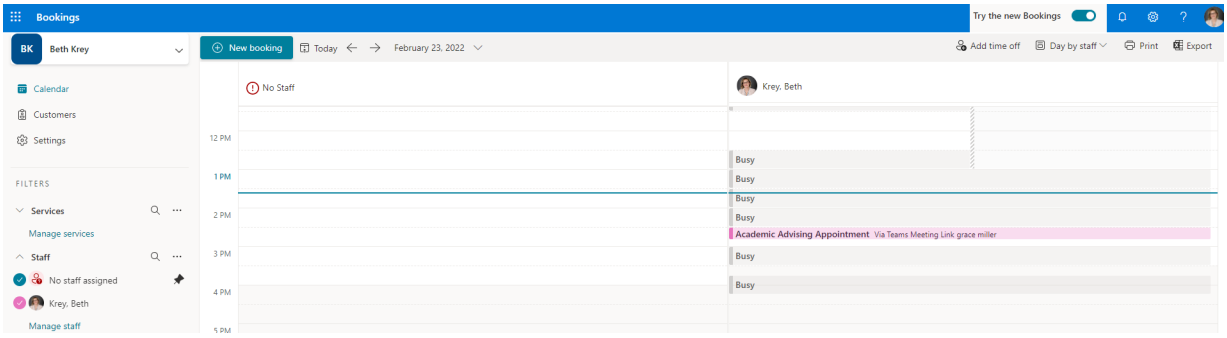
When you first access Bookings it will ask you the name of your organization – do NOT type Marquette University, instead **type your name of your calendar.** Examples: Ms. Beth Krey, Beth Krey or Professor Krey. This label request from Bookings may seem confusing as you might want to type Marquette, 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".



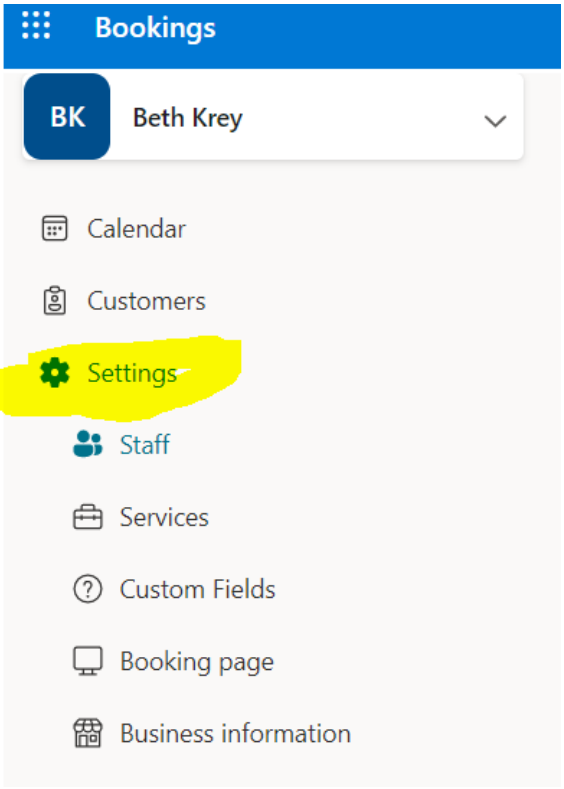
On the Bookings home page – be sure that **Try the new Bookings is selected**. Your main Bookings page should change from this:



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

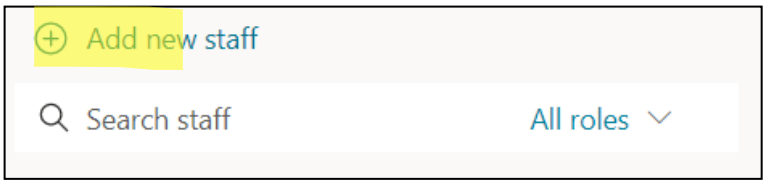


On the left toolbar there are great navigational tools – as we go through this session, all will be found through selecting **Settings** and you will adjust the **Staff, Services** and **Booking Page tabs** throughout this guide.

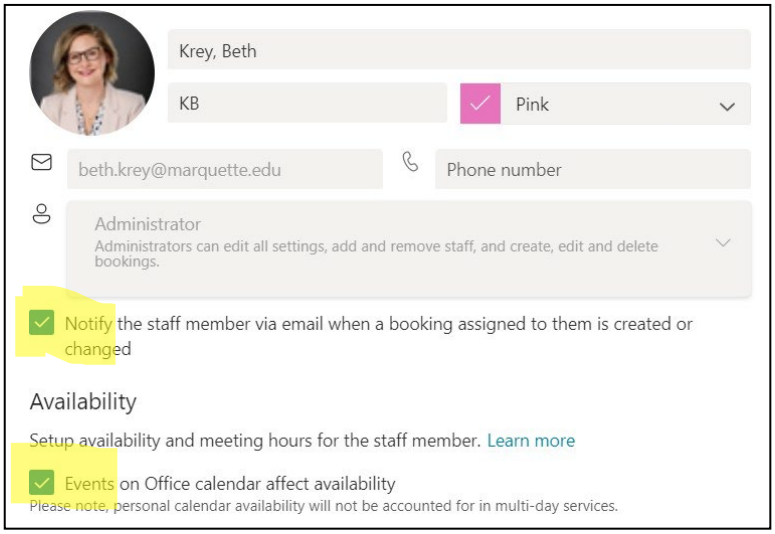


STAFF PAGE

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**:

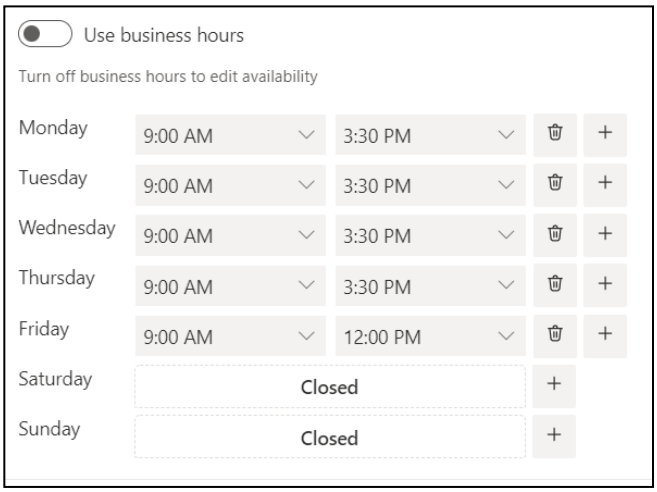


Within the **Staff page** – enter your contact information. Below that, make sure **"Notify the staff member via email when a booking assigned to them is created or changed" is selected.** This will share an email with you each time a student adds or cancels an appointment.

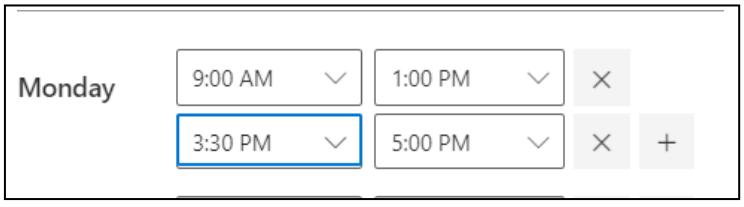


Also make sure **"Events on Office calendar affect availability" is selected**. This will use your current Outlook schedule to show availability in that exact moment as a student is trying to schedule an appointment.

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.



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:

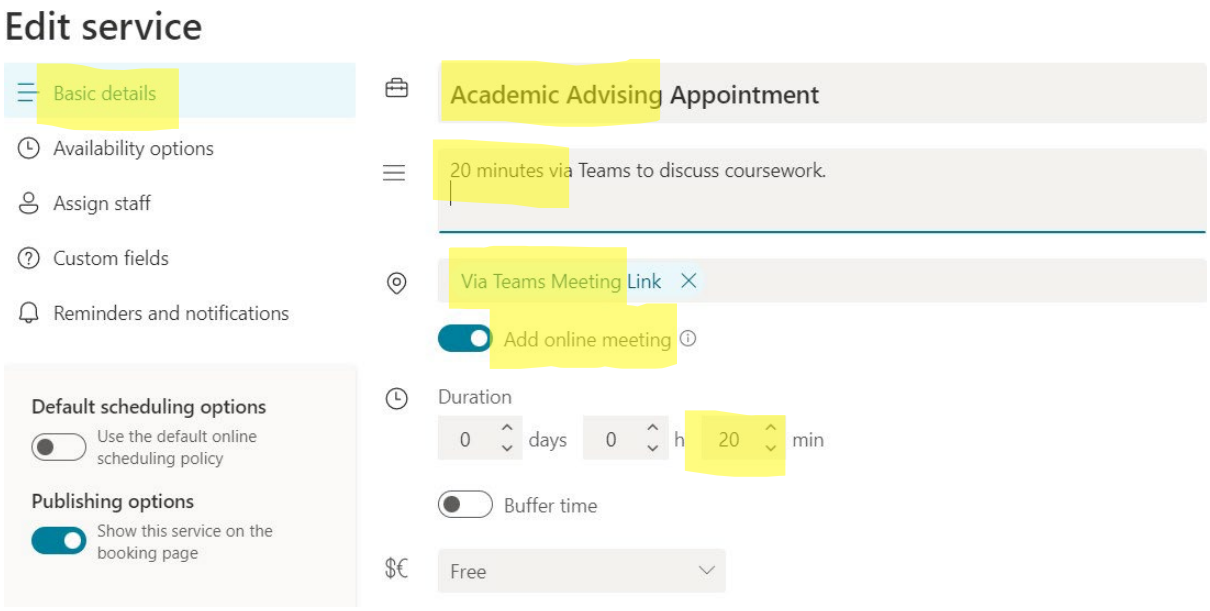


Click on **"Save Changes"** at the bottom of the page to complete.

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.



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.

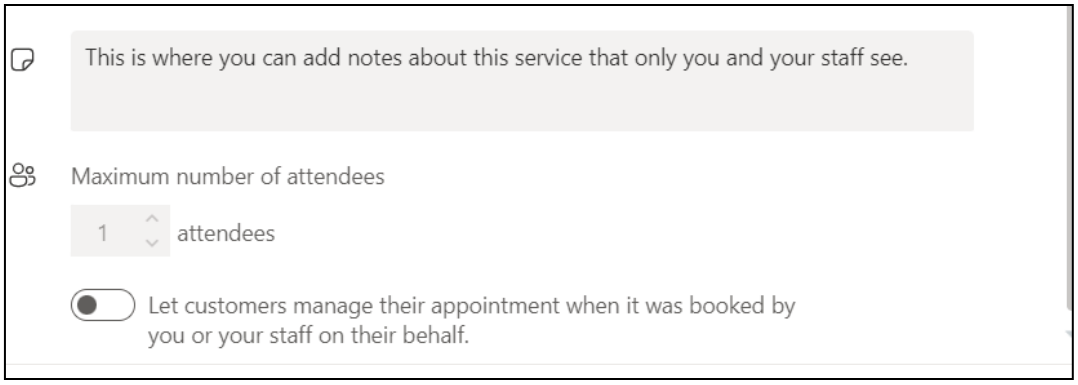
Duration "20 minutes"

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:

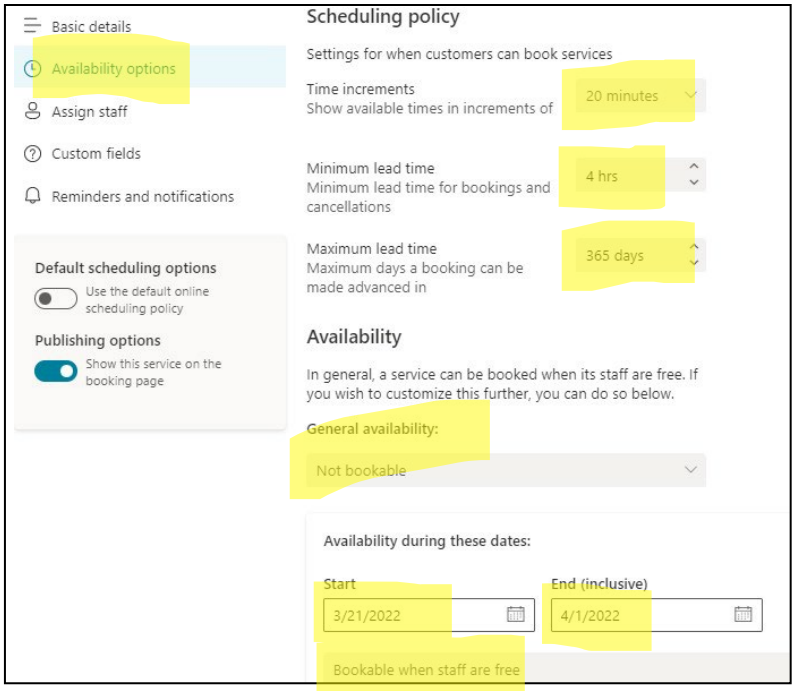
Notes: Blank, Maximum numbers of attendees" as 1, and the "Let customers manage their appointment when it was booked by you or your staff on their behalf" button should remain unselected.



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.

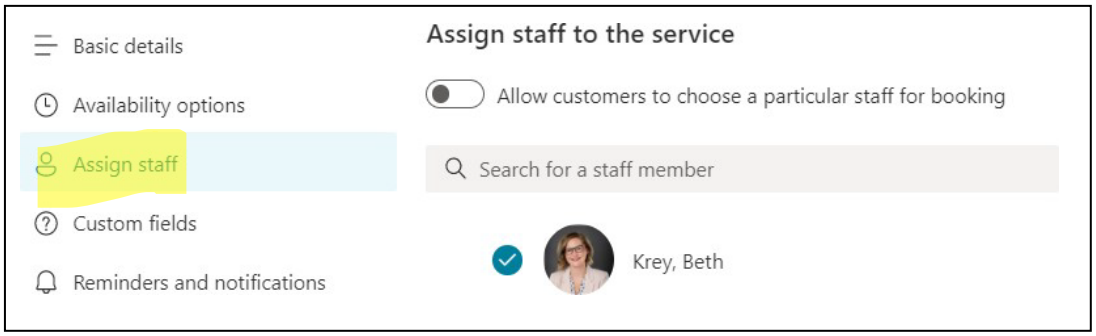


Within **Availability** select "not bookable" in **General availability** because you only want to be bookable during the Academic Advising period.

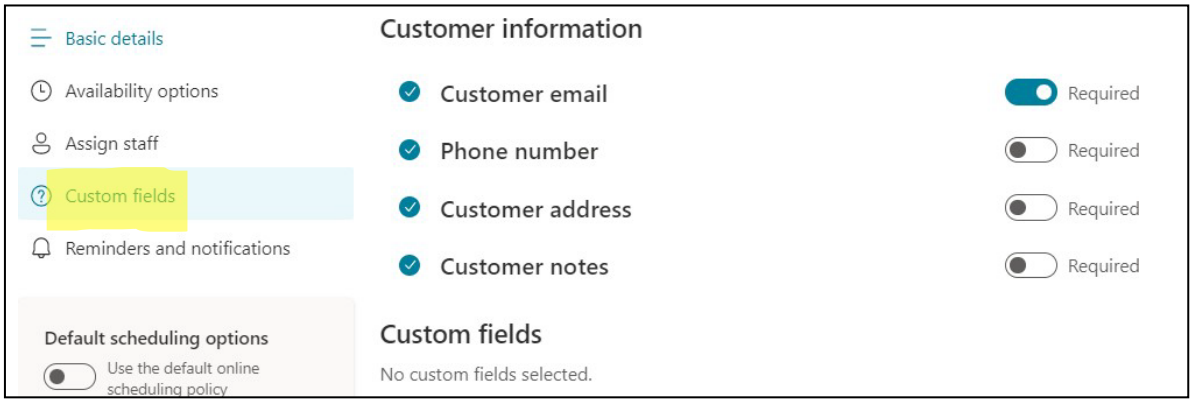
Your **Availability during these dates** should be adjusted to the period of time you are seeking to host appointments. If you want to setup specific advising time blocks, choose "custom hours" and setup your time blocks (see p. 5) if you are doing different hours for the second advising week, you may 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

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

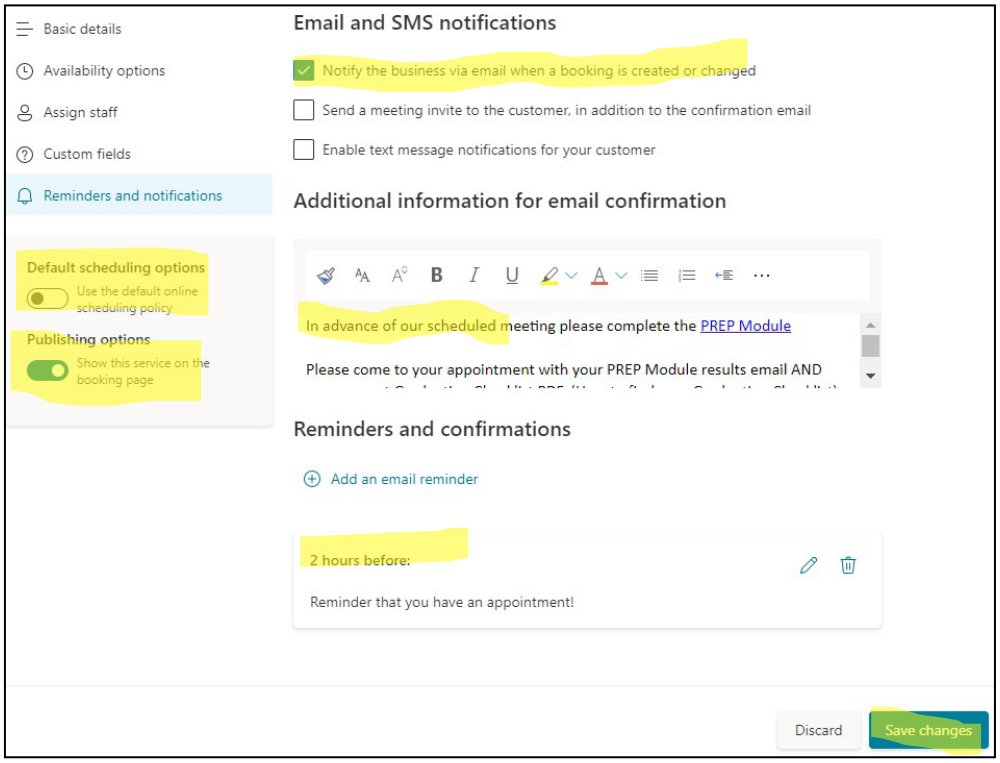
Within the **Assign staff** tab, make sure you are assigned to the service (check next to your name) and make sure “allow customers to choose” is turned off.



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



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



For **Email and SMS notifications** select that you want to be notified when an appointment is created or changed.

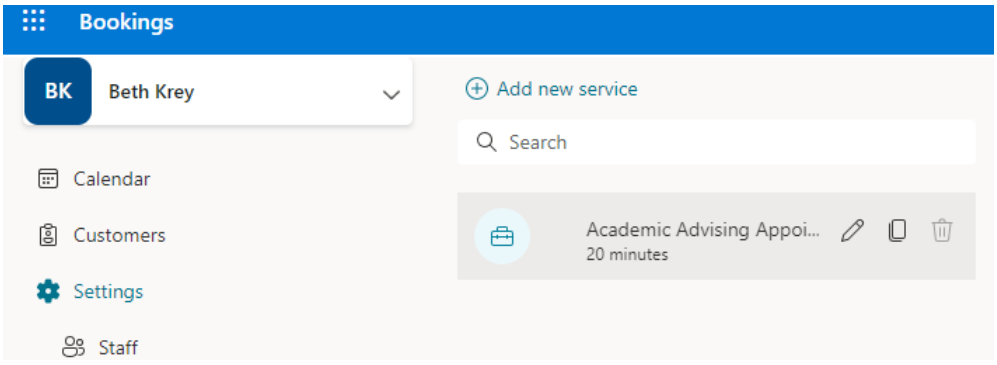
Within the next area **Additional Information for Email Confirmation**, this is where to add information about what you want from them for the appointment. These details are what is shared in the Email Confirmation about the appointment. You can edit anything here. You can also set up additional email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

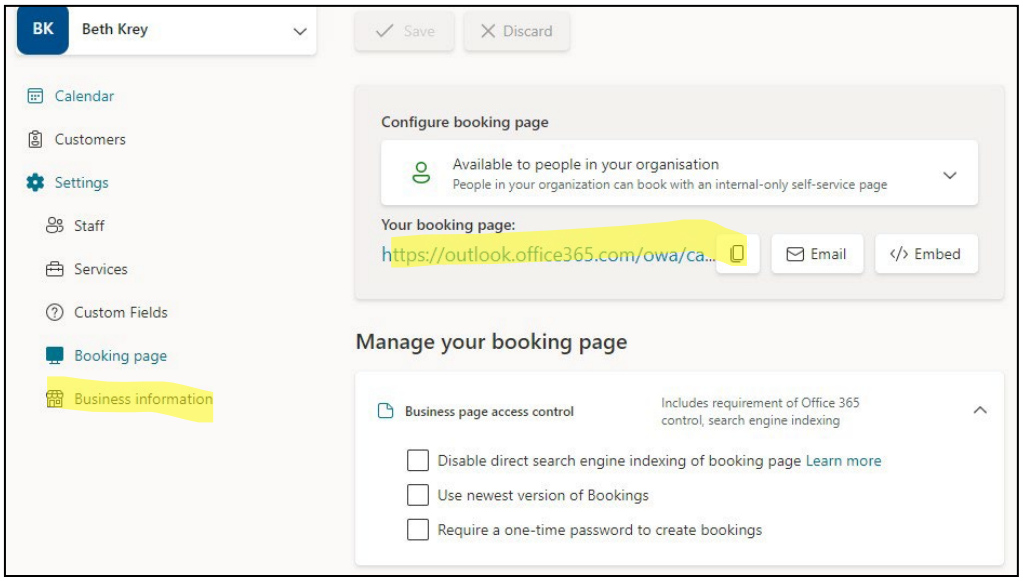
Under **Reminders and Confirmations** the system will auto send two reminders the day before an appointment. It's recommended you remove the "We look forward to seeing you!" reminder and keep only "Reminder that you have an appointment!" set for 2 hours before the appointment.

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:

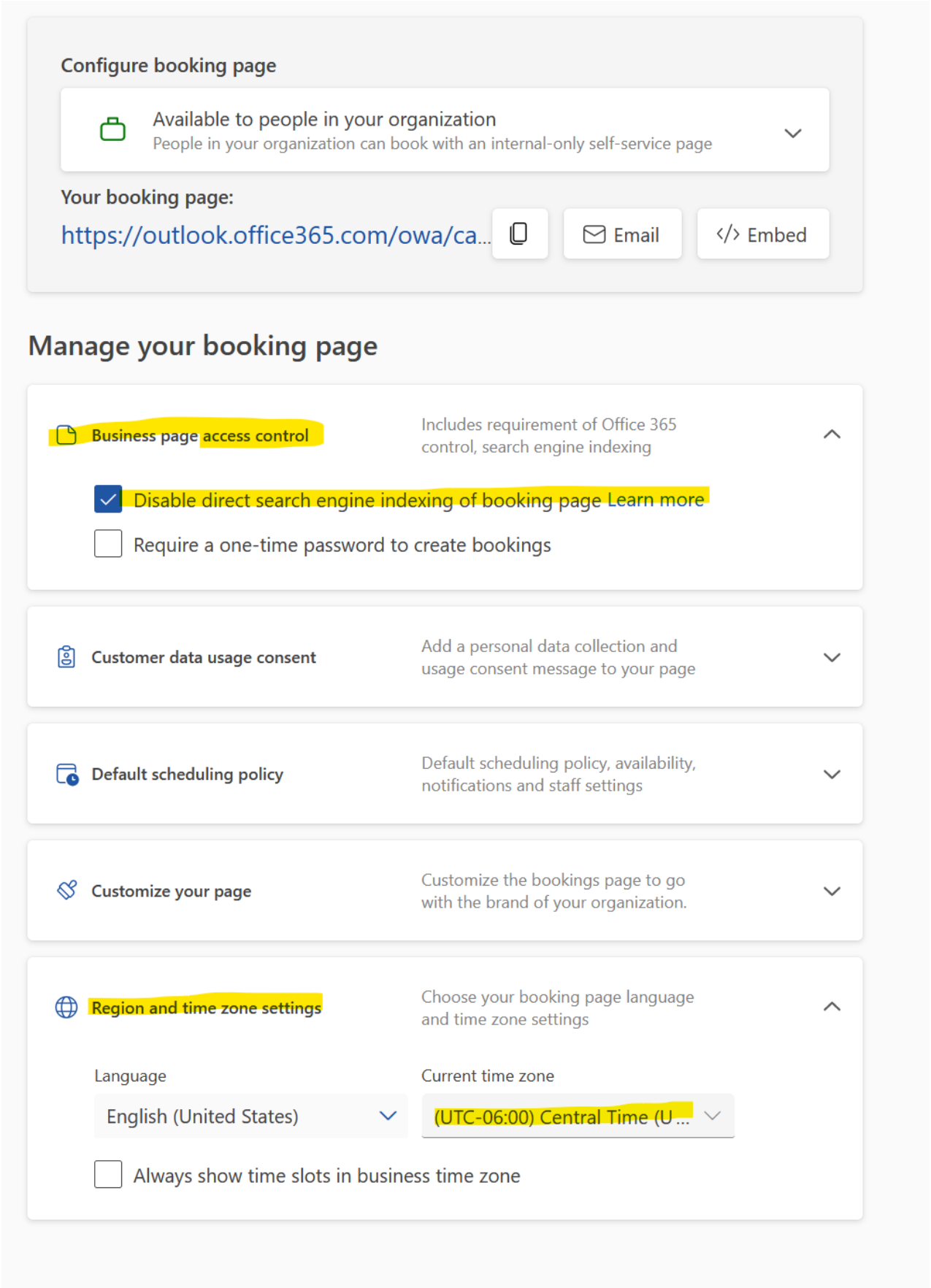


BOOKING PAGE

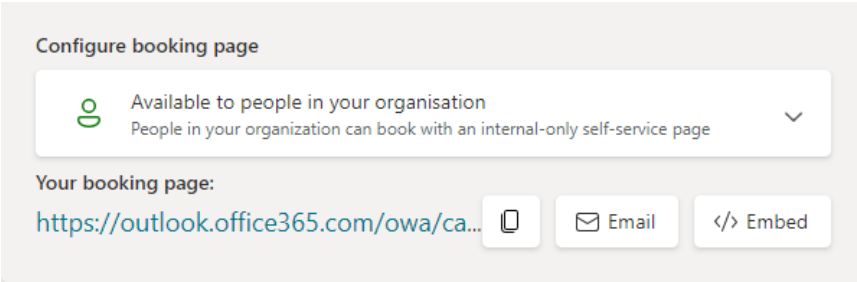


Your booking page is your personal link that you can share and that students will use to book appointments.

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.

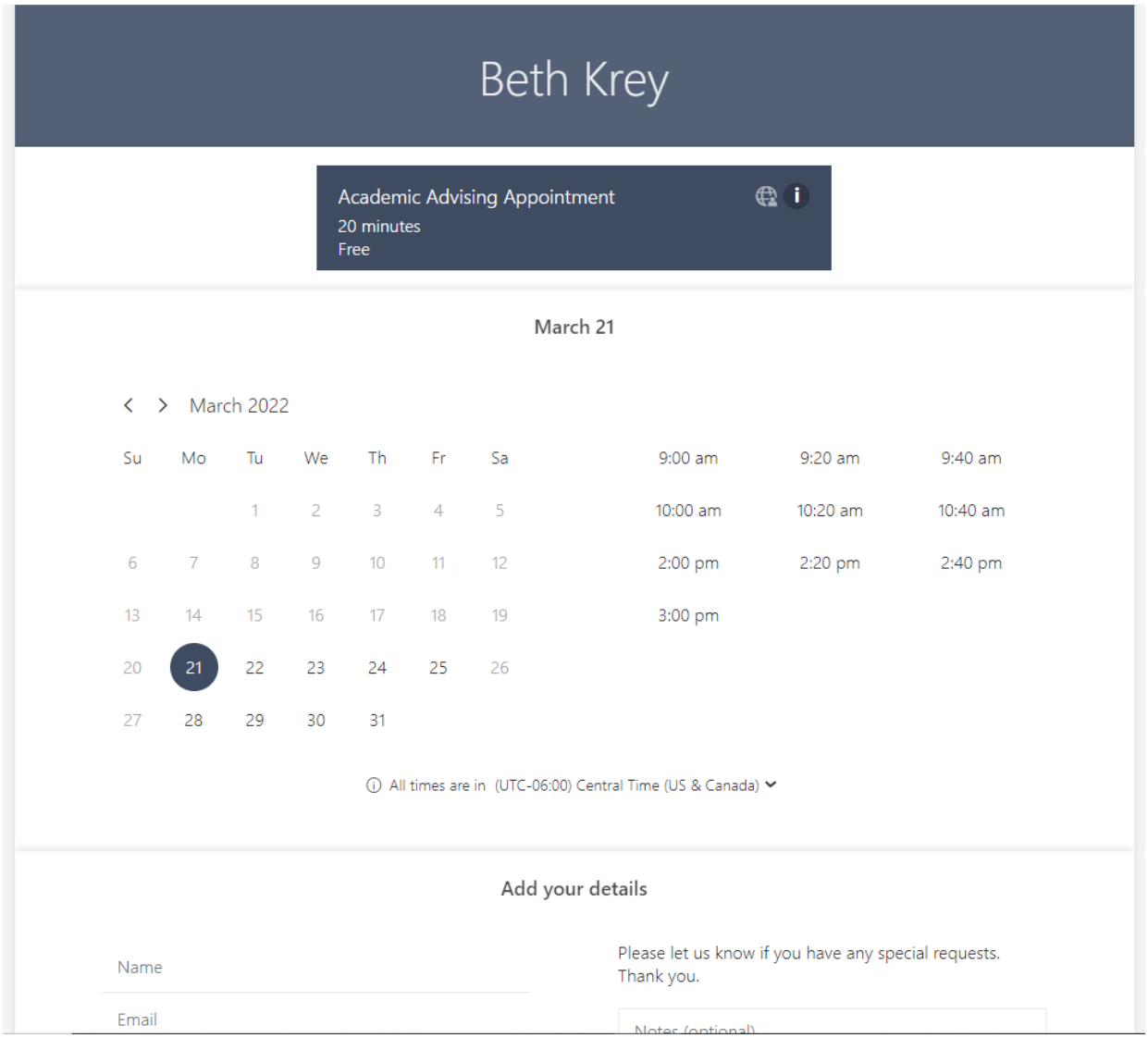


Review this link to see what students see… do you see meeting dates there? Poke around a bit to see if your open time blocks on your current Outlook calendar show up for the timeframes and dates you set.

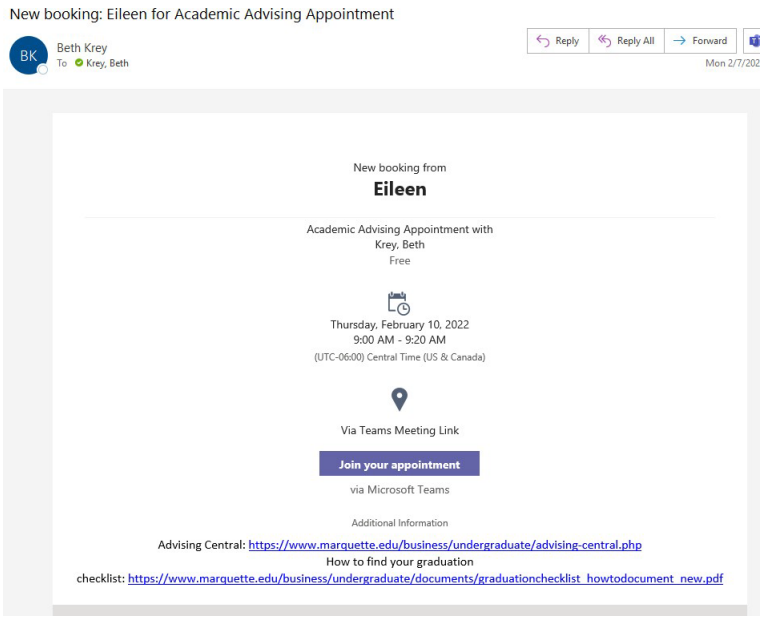
Once all set, send your Bookings Calendar link to Sara.Koenig@Marquette.edu.

Here's mine:
https://outlook.office365.com/owa/calendar/BethKrey@marquette.edu/bookings/

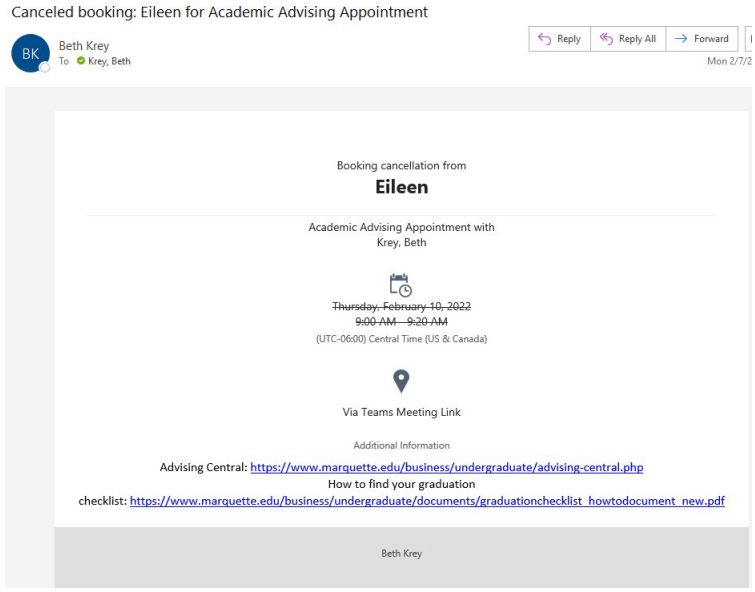
If you click on your link it will show what your students will see:


Beth Krey
Academic Advising Appointment
20 minutes
Free
March 21
March 2022
Su Mo Tu We Th Fr Sa
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31
9:00 am 9:20 am 9:40 am
10:00 am 10:20 am 10:40 am
2:00 pm 2:20 pm 2:40 pm
3:00 pm
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.

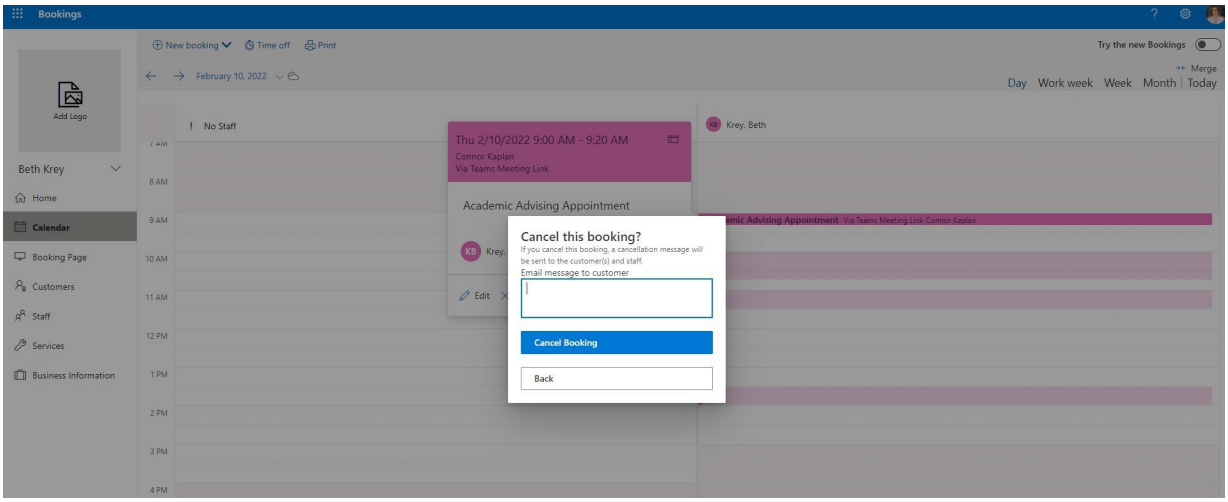
Here's what comes through to your email once someone books (and it makes an outlook meeting request on your calendar):



If cancelled, this is what you receive:



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.


Bookings
New booking
Time off
Print
Try the new Bookings
February 10, 2022
Day
Work week
Week
Month
Today
Add Logo
Beth Krey
Home
Calendar
Booking Page
Customers
Staff
Services
Business Information
No Staff
Krey, Beth
Thu 2/10/2022 9:00 AM - 9:20 AM
Connor Kaplan
Via Teams Meeting Link
Academic Advising Appointment
Edit
Cancel this booking?
If you cancel this booking, a cancellation message will be sent to the customer(s) and staff.
Email message to customer
Cancel Booking
Back