MICROSOFT BOOKINGS - INTRODUCTION

McGill University
AGENDA

1. Why use MS Bookings?
   - Use cases
   - Request a license

2. Strengths and Limitations

3. Front-end experience for your customers

4. Build and publish your online booking system (Back-end)

5. Best practices

6. Support/resources
Why use MS Bookings?

Use cases

Request a license
MS Bookings

• Online and mobile app for groups who provide services to customers on an appointment basis.

• Available to faculty, staff, students
• Allows your customers to easily book appointments
  • for 1 or more services that you offer
  • with you (and your team, if you have one)
  • based on your business hours and availability
• Integrates with your existing Outlook calendar

MS Bookings

Allows you (individual or group) to:
• schedule individual or group training sessions, either in person or online.
• publish a schedule of available meeting times
• accept online appointment requests
MS Bookings

Features include:

- **Front-end**: a booking page where your customers can:
  - schedule appointments with staff members available to provide the service
  - show this page on your web site or through a link

- **Back-end**: web pages where the group owners can manage:
  - staff lists and schedules
  - define services and pricing
  - set business hours
  - customize how services and staff are scheduled
Use cases include:

- informal registration for events and information sessions
- instructor office hours
- meeting with students
- reserving rooms or other physical assets
- managing appointment times

What are you going to use it for?
Request a license

1. Attend this session

2. Request your license – assigned within 48 hours
   https://mcgill.ca/x/4d6

3. Register for Microsoft Bookings Q&A and set up session
   - Meet with an expert to help you set up your own Bookings site
1. Take Bookings - Introduction training.

2. Request a license (assigned within 48 hours) [https://mcgill.ca/x/4d6](https://mcgill.ca/x/4d6)

3. Once you get your license, ask one of the administrators of the existing Bookings site to add you as viewer or administrator.

4. You will receive an email with a link named “manage membership”.

5. Click on the link to approve the action.

6. You are now a bookable staff on the site.
Hello

Welcome to Microsoft Bookings!

Bookings is an Office app that makes it easy for others to grab time with you when you are free. Bookings makes scheduling easier and removes the back-and-forth usually needed to find a good time to meet. You can learn more about Bookings here: https://office.com/bookings

You are receiving this notification because you have been added as a staff member to ITS services booking calendar.

Your free/busy information will be shareable through Bookings based on your membership settings and others will be able to grab time with you when you are available.

Action is required from you to approve your staff membership.

To view or change your membership in the ITS services booking calendar, please use the member management area.

Thank you.
You are logged in as [email protected].

These are your current staff membership status details:

**Pending for approval**
You'll not receive bookings and your free/busy information will not be shared until you take an action.
Last changed: 2021-03-16 12:38:04 AM (UTC)

You can use the following actions to change your membership status.
- If you approve, then you will receive bookings where you are a staff member from this booking calendar.
- If you deny, then you will not receive any bookings from this booking calendar.

[Approve] [Deny]

**Active**
You'll receive bookings based on your free/busy information.
Last changed: 2021-03-16 2:36:06 PM (UTC)

You can use the following actions to change your membership status.
- If you stop your membership, then you will no longer receive bookings from this booking calendar. You can choose to resume your membership at a later time.

[Stop membership]
Staff details

Enter information about your staff member

Membership information
Status: Bookable (User has approved)
Last changed: Tue 3/16/2021 10:36
Email last sent: Mon 3/15/2021 20:38 | Re-send
Mona
Administrator
Administrators have full access to the Bookings calendar and all its capabilities.

Eric
Scheduler
Schedulers handle the day-to-day operations and can manage appointments and customers.

Lydia
Team member
Team members have control over their own appointments and availability.

Carlos
Viewer
Viewers have read access to all parts of the calendar but don't have permissions to make any changes.

Daisy
Guest
Guest cannot open the Bookings calendar but can be assigned appointments communicated via emails.
MS BOOKINGS: STRENGTHS & LIMITATIONS

- Front-end: very easy to use for customers
- Back-end: not very intuitive, limited reporting
For your customers
1. select service
2. select date/time
3. enter details
4. click ‘Book’
url not modifiable once created.

can change business name in back-end; url does not update.

1 or more services we offer, with different durations.

Select available date & time. Some services may allow you to select a staff member.

Customer can select their own time zone.

Name is a required field. Other fields may be required or optional.
NEW LOOK ON THE FRONT END

Description is more noticeable.
Email confirmation and meeting invitation for clients.
Build and publish your service
ACCESS THE MS BOOKINGS APP

1. Go to www.office.com
2. Sign in with your McGill credentials
3. Click MS Bookings App
MS Bookings

• Once you get a booking site, you get an email on how to log in
• Once you are logged in, you see your calendar
  • Your business name & logo
  • Do not go from top to bottom
  • Start with ‘Business Information’
Business Information
- Business name, phone, address, email, business logo
- Send customer replies to
- Default Business Hours, etc

Staff
- View staff providing services & view if they are bookable
- Select default booking hours per staff member, or select staff availability
- Add a staff member to the site

Booking page
- Booking page status
- Get link to share your booking page
- Customize your booking page, - elect color theme, display the logo on booking page
- Region and time zone settings
- Booking page access control
- Customer data usage consent
- Scheduling policy

Services
- Service details for each service
- Default duration and buffer time
- Maximum attendees
- Custom fields
- Reminders and Confirmations
- Publishing Options
- Online scheduling options

Save and publish
### Manage staff

Add and edit information about your staff members

<table>
<thead>
<tr>
<th>Initials</th>
<th>Name</th>
<th>Role</th>
<th>Bookable</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS</td>
<td>Courtney</td>
<td>Administrator</td>
<td>Yes</td>
<td>courtney.s...</td>
<td>No phone</td>
</tr>
<tr>
<td>GM</td>
<td>GengY</td>
<td>Administrator</td>
<td>Yes</td>
<td>gengyi.zhi...</td>
<td>No phone</td>
</tr>
<tr>
<td>JR</td>
<td>Joanne</td>
<td>Administrator</td>
<td>Yes</td>
<td>joanne.doe...</td>
<td>No phone</td>
</tr>
<tr>
<td>MB</td>
<td>Matthew</td>
<td>Administrator</td>
<td>Yes</td>
<td>matthew.b...</td>
<td>No phone</td>
</tr>
<tr>
<td>AC</td>
<td>Andrew</td>
<td>Administrator</td>
<td>No</td>
<td>andrew.co...</td>
<td>No phone</td>
</tr>
<tr>
<td>BT</td>
<td>Bounmy</td>
<td>Administrator</td>
<td>No</td>
<td>bounmy.t...</td>
<td>No phone</td>
</tr>
<tr>
<td>MI</td>
<td>Mercy</td>
<td>Administrator</td>
<td>No</td>
<td>mercy.isac...</td>
<td>No phone</td>
</tr>
</tbody>
</table>
### Booking Page Status
- **Published**
- Share your page:
  - [https://example.com/bookings/demo](https://example.com/bookings/demo)

### Connect to Facebook
Add a "Book Now" button to your Facebook page.
- **Connect**

### Booking Page Access Control
- Require a Microsoft 365 or Office 365 account from my organisation to book
- Disable direct search engine indexing of booking page

### Customer Data Usage Consent
- Show a personal data collection and usage consent toggle along with a message on my booking page
- **I agree to your terms**

### Scheduling Policy
- **Settings for when customers can book services**
  - **Time increments**: [Choose available times](https://example.com/bookings/demo)
  - **Minimum lead time**: 1
  - **Maximum lead time**: 14 days

### Email Notifications
- Notify the business by email when a booking is created or changed
- Send a waiting invite to the customer in addition to the confirmation email

### Staff
- Allow customers to choose a specific person for the booking

### Availability
- Generally, a service can be booked when its staff are free. If you wish to customise this, you can do so below:
- **General availability:** [Select whether staff are free](https://example.com/bookings/demo)
## Manage services

Create and edit your bookable services

<table>
<thead>
<tr>
<th>Service</th>
<th>Duration</th>
<th>Default price</th>
<th>Assigned staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office hours</td>
<td>10 minutes</td>
<td>Price not set</td>
<td>Courtney Sheppard</td>
</tr>
<tr>
<td>Phony consult</td>
<td>2 hours</td>
<td>Price not set</td>
<td>Courtney Sheppard</td>
</tr>
<tr>
<td>Counterfeit morning chat</td>
<td>30 minutes</td>
<td>Price not set</td>
<td>Joanne L</td>
</tr>
<tr>
<td>Sham afternoon meeting</td>
<td>15 minutes</td>
<td>Price not set</td>
<td>Courtney Sheppard</td>
</tr>
</tbody>
</table>
MS Bookings is a McGill-approved cloud service to store protected and personal data.

However, do not use to store certain types of regulated data. For more info, see cloud services that have been approved/rejected for McGill use.

When you personalize the form for booking an appointment, make sure not to ask any personal data if you don’t have a need for that information.

If you have to ask for personal data, add a “Customer data usage consent” checkbox, so that the person can acknowledge that you are collecting and storing this information.
Shining a light on policies!
Visit the IT policies webpage.

Don’t give your privacy away!
5 tips to protect your privacy.

Be cloud safe!
Visit the Cloud Services webpage.
Cloud Data Directive | What Data is Sensitive?

Visit [mcgill.ca/cloud-directive](mcgill.ca/cloud-directive)

**Public** institutional data
- Non-confidential information

**Regulated** institutional data
- Data protection/use is mandated by law, regulation or industry requirement

**Protected** institutional data
- Data that is not regulated, nor public
- Data protection/use is governed by contract or McGill rules

- Press releases
- Public access website pages
- Published documents, ex. brochures, annual reports, academic calendars, campus maps, course descriptions, etc.
- Personal information
- Student/employee records
- Payment Card Information
- Legal files
- Internal memos
- Meeting minutes
- Documents incl. proprietary information
- Research grant applications
SUPPORT/RESOURCES

- Visit [Microsoft Bookings Training](#) on IT Support site
- [MS Bookings - Service Overview](#)
Q & A sessions

Register for Microsoft Bookings Q&A and set up session

- Meet with an expert to help you set up your own Bookings site
- Book a session from Collaboration Solutions – ITS Services
Your opinion counts!

➢ Please complete the Course Evaluation Form to help us better the training: https://forms.office.com/r/vmt8SJkM9t

➢ Answer some questions to consolidate what you learned: https://forms.office.com/r/ySXH5HQ3FS