MS Bookings & Instructor Office Hours

Contents

Requesting a license

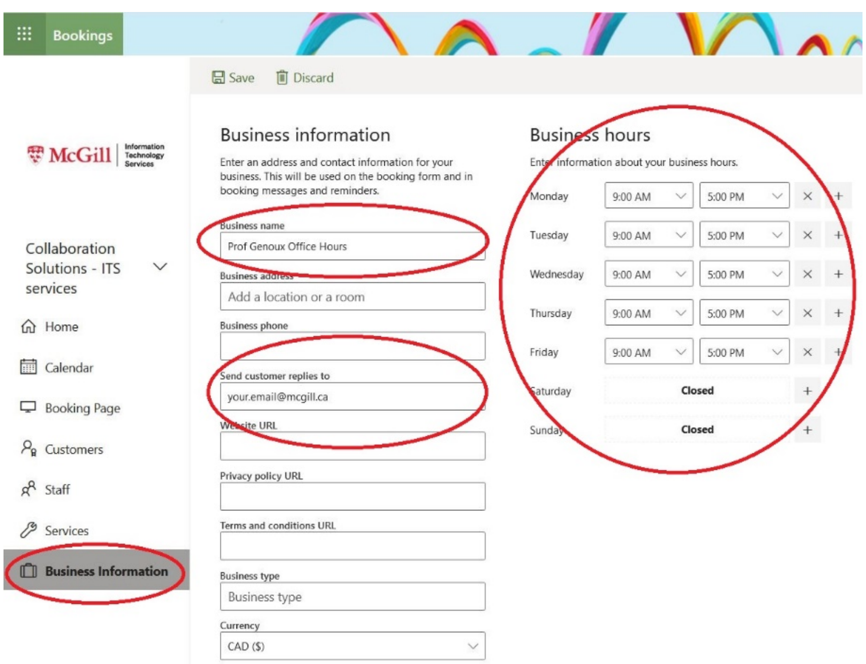
If you do not already have a license to use MS Bookings, you can request one here: https://mcgill.ca/x/J64. Licenses take up to 2 business days to be assigned, and you will receive an email confirmation when your license is active.

Logging into MS Bookings

You can find the Bookings app by logging into www.office.com with your McGill credentials, selecting "All apps" , and then clicking on Bookings Bookings .

From there, you can click “Get it now”, and then **create your own, new Bookings site**. When prompted for Business Name, enter the title you would like to display to people booking with you. For example, “Courtney’s Swanky Services” or “Prof Tremblay Office Hours”. You do not need to enter a Business Type.

Setting Business Information



In the Business Information tab, we will set the following fields:

Business name

This is initially set to the Business Name that you entered when you first set up your Bookings page. It will display as a title on the top of your Bookings page and in the URL for your page. It can be modified from the Business Information tab, but that only changes the title on the top of the Bookings page, and not in the URL. The URL is not modifiable after the Bookings page is created.

Send customer replies to

This is initially set to your email address. It can be modified to any email address. When you create a new service for your Bookings page, you will have the option to send an email to this email address any time a Booking is created or changed. This is useful if you have a generic or departmental email address that you would like to notify of your Bookings, but otherwise, you can safely disregard this field.

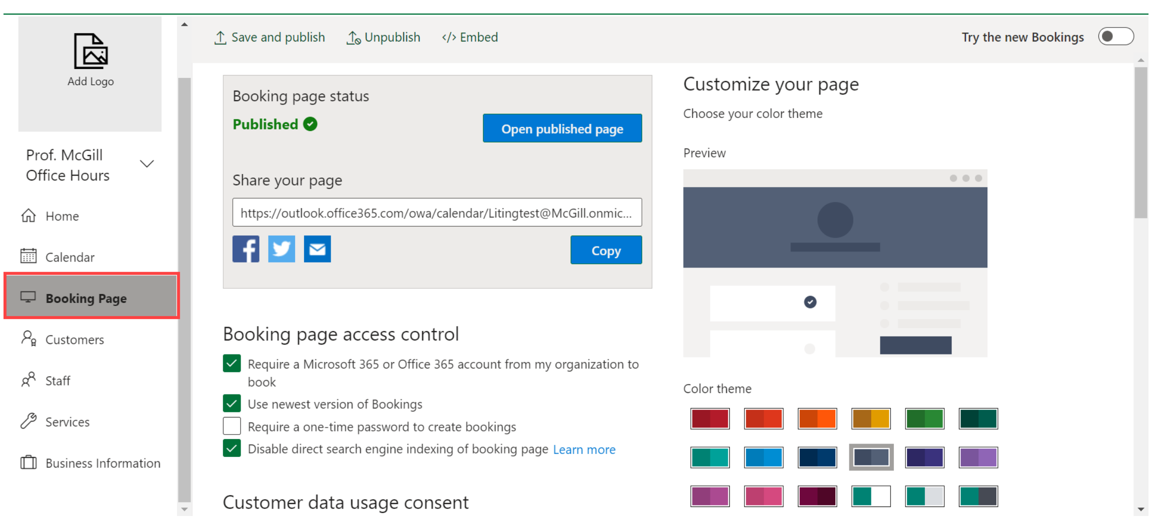
Business hours

This is the widest range of hours that you could ever want to have a meeting via this Bookings page. It is initially set to 9am – 5pm Monday to Friday, but you can adjust it to meet your schedule. We will narrow down these time windows later on.

When you are done, click "Save".

Setting Booking Page information

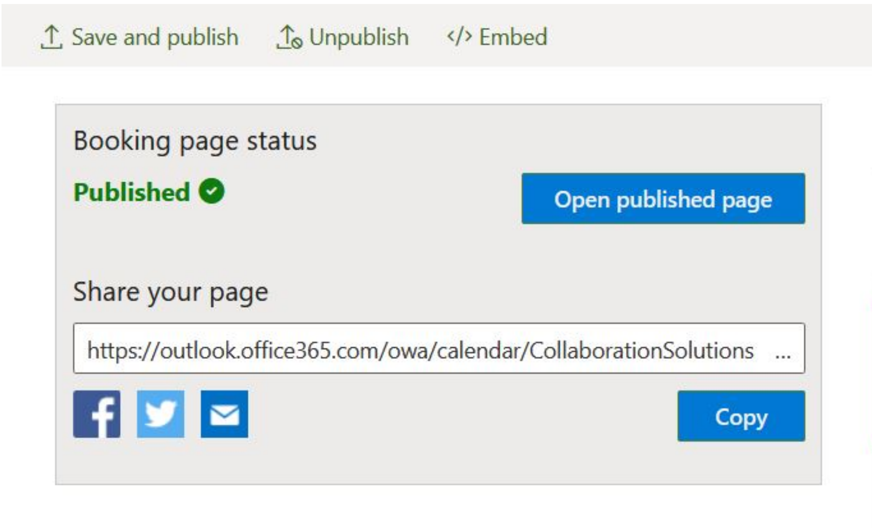
When you first view the Booking Page tab, your page will be "Not published". This will change to "Published" as soon as you click "Save and publish" at the top of this page.



There are many settings on this page.

Booking page status

- shows you the current status of your page (Not published / Published)
- allows you to “Open published page” to view your public-facing Bookings page
- shows you the URL for your Bookings page and allows you to copy it to share with others

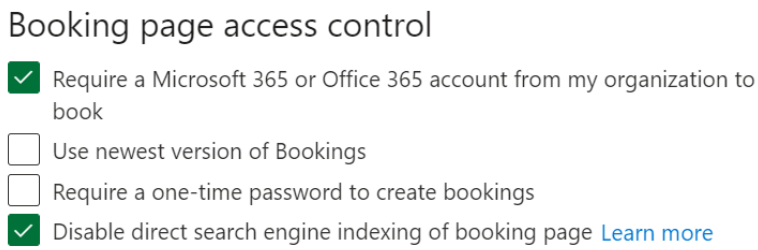


Booking page access control

This set of options controls who can make a Booking with you, and how people can find your page.

If you enable the first option, “Require a Microsoft 365 or Office 365 account from my organization to book”, only people that are signed into a valid @[mail.]mcgill.ca account will be able to book with you. If you expect to meet with people that may not have a McGill account, for example prospective students or community partners, you should ensure this option is disabled (no check mark in the box).

Generally, you will want to enable (check mark in the box) the option: “Disable direct search engine indexing of booking page”. If this option is enabled, your Booking page will not show up in web searches, like Google, Bing or Yahoo. Not showing up in these search engines will help reduce the chances of random people or bots making false Bookings with you.



Customer data usage consent (Cloud Directive)

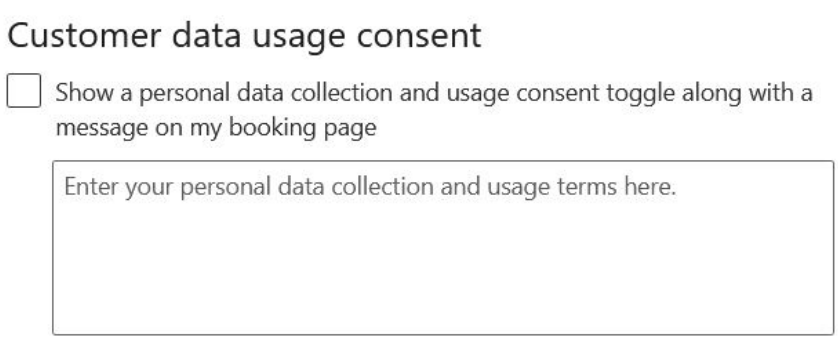
When we are using services "on the cloud", meaning that they are not hosted at McGill, we always need to consider the McGill Cloud Directive. This will make sure that we are protecting our data, McGill's data, and our student's data, as well as everyone's privacy and security. You can learn more about the Cloud Directive here: https://www.mcgill.ca/it/policies/cloud-directive

Because Bookings is part of the Office 365 suite of applications, it is already approved for use at McGill for a very wide variety of data, including: names, email addresses, student numbers, academic details, and almost all other types of information. The only two exceptions are:

- **Personal health information**, unless we have the explicit consent of the person whose health data we are collecting. This means that if you will be asking any questions that may touch on health information, it may only be the health information of the person booking with you, and you must have a data collection notice and consent toggle. You can use this setting to input your notice and require the consent toggle.

- **Payment card information**: we must never put payment card information (like credit card details) into a non-PCI compliant solution, so we cannot accept that data in Bookings.

If you will not be asking personal health questions, you do not require the notice or consent toggle.

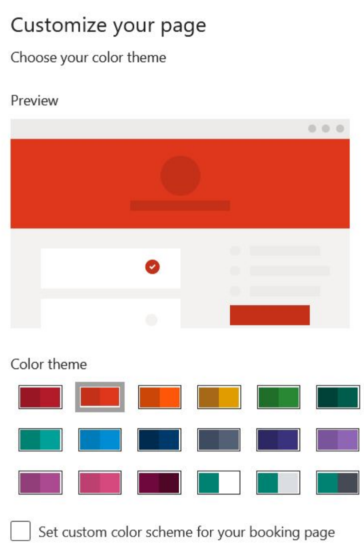


Scheduling Policy

This is the default scheduling policy for your Bookings page. If you intend to offer multiple types of appointments with similar scheduling parameters, this is a good place to set those, but generally, we will set these on a service-by-service basis, so there is no need to adjust them in the “Booking page” area.

Customize your page

You can use this set of options to choose from a pre-selected set of colour schemes, or set your own using colour codes. If you choose to use a custom colour scheme, please consider accessibility and select a set of colours that provide high contrast.

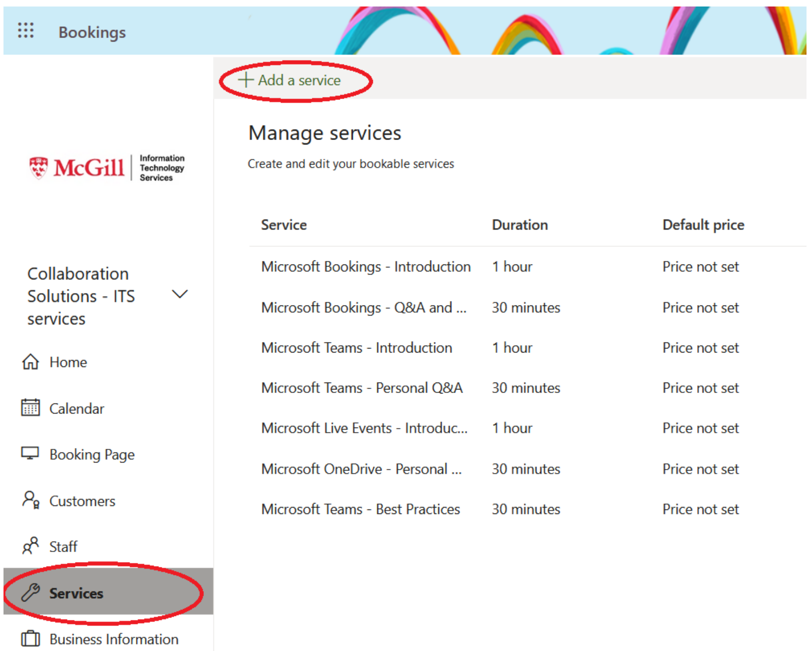


Region and time zone settings

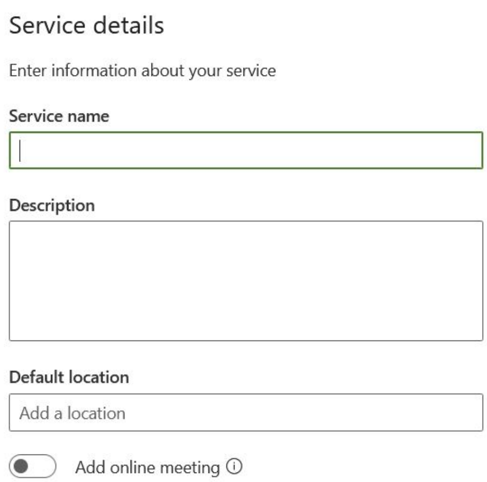
By default, your Bookings calendar time zone and language settings will generally match the time zone and language that you are currently working in, but occasionally this default setting can be incorrect. You should check that the time zone is set correctly by clicking on “Change language and time zone settings” and verifying that the time zone is accurate. You can also change the language of your calendar from here, which will change the way the date and time are displayed, as well as automatically generated text on your Bookings page. Note that this does not translate any text that you have input, such as your Business Name; you need to translate that text manually.

Services

To add a new service, click on "+ Add a service".

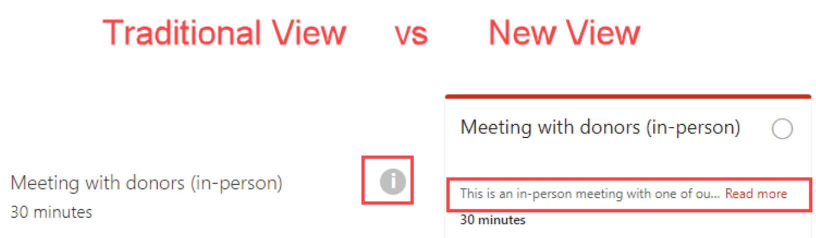


Service details



You will give the service a **name**, which will appear on your user-facing Bookings page.

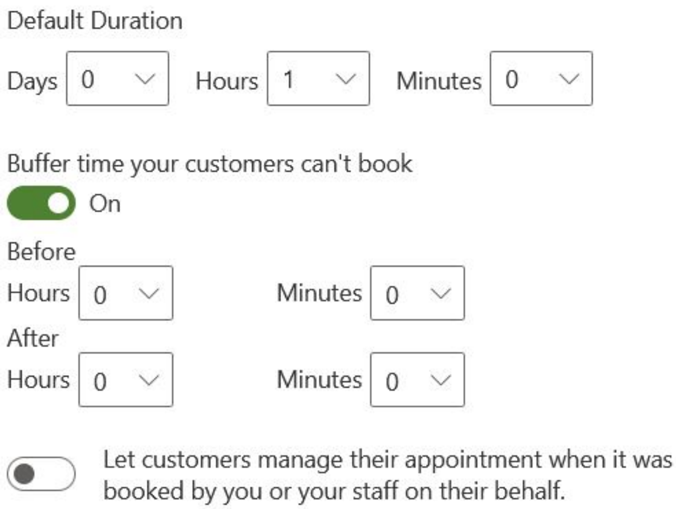
You can also optionally provide a service **description**, but this may not be very obviously visible on the user-facing Bookings page, depending on whether your public-facing page is using the new view or traditional view. (See screenshot below for where the description is located.)



The **default location** can be a physical address, or it could be a link to a web-conferencing service other than MS Teams, such as WebEx or Zoom. If you intend to use MS Teams, you can leave this field blank, and simply toggle the "Add online meeting" slider to the "on" position.

Add online meeting will automatically add a Teams meeting link in all notifications, emails, and calendar entries regarding your Booking. You can turn this on if you would like to use MS Teams for your meetings.

Default Duration and Buffer time



The default duration, in Days, Hours, and Minutes is the length of time that you would like to be booked for the formal meeting. 10 or 15 minutes are common choices for office hours, but you may choose more or less time as you need.

Buffer time is a period before or after a scheduled meeting, during which you cannot be booked again, so that your meetings aren't scheduled back-to-back. This gives you time to get a coffee, send an email, catch your breath, or protect you against one meeting running long and putting you behind for your whole day. 5 minutes after each meeting is a common choice.

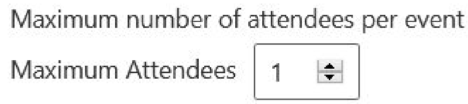
The last toggle option: "Let customers manage…." can be left off as default.

Maximum Attendees

When you select a maximum number of attendees, you are permanently selecting between two options for your service: Is the service **one-on-one**, or **group**?

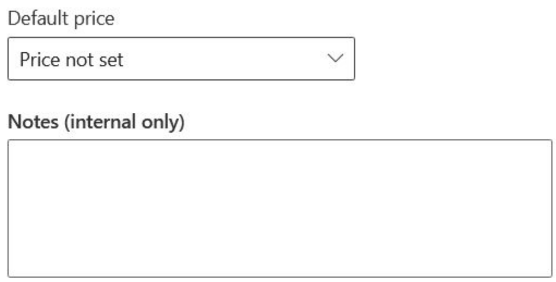
If you select 1 attendee, only one person will be able to reserve each slot that you make available, though more people can be invited to the meeting itself by forwarding the email confirmation or calendar invite. You will not be able to adjust this setting after you finish creating the service.

If you select a number other than 1, then the service is a group service, and more than one person (up to the maximum that you specify) may register for each time slot. You can adjust this maximum after you create the service, but you will never be able to set it to 1.



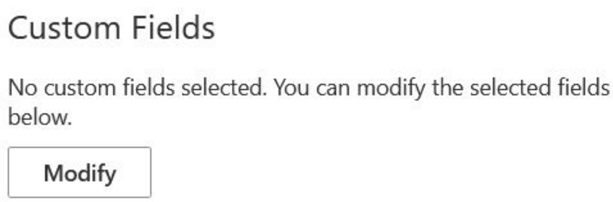
Default price and Notes

You can leave both of these as default: Price not set (otherwise, pricing information will appear on your service), and no notes (because these notes are not visible to the user).



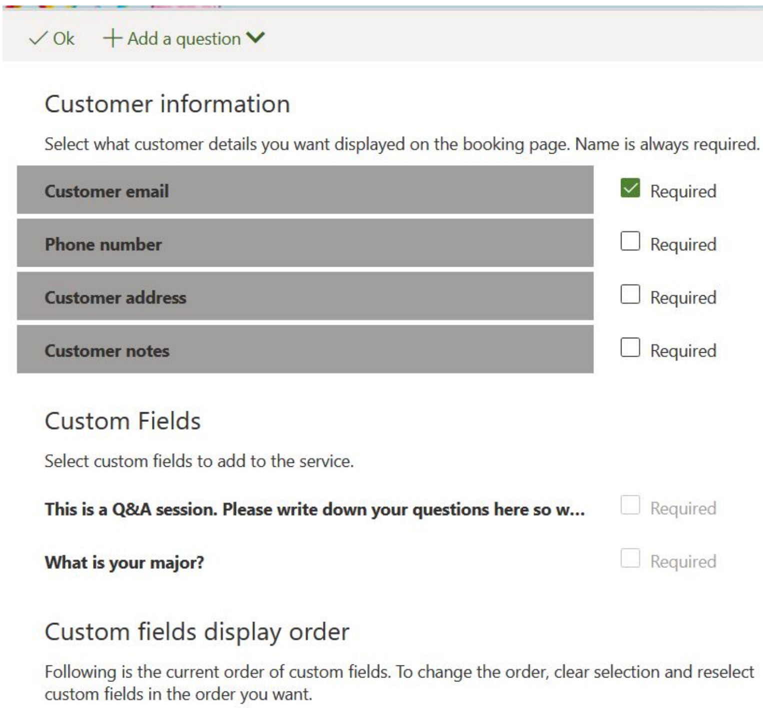
Custom Fields

This is where you may collect more information about the person that would like to book with you. Click “Modify” to see what questions people will be asked when they book the service.

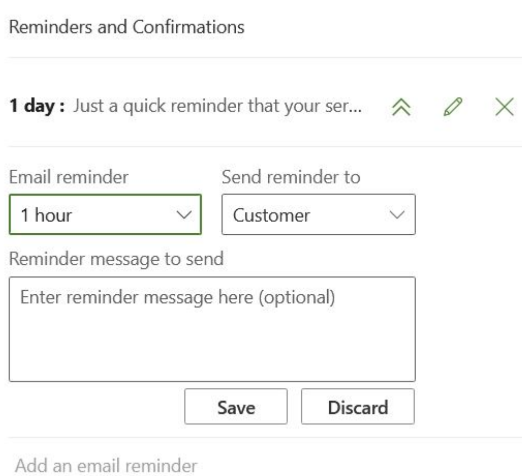


There will always be a field for the person’s name, and four additional questions that are asked by default: Customer email, Phone number, Customer address, and Customer notes. The customer email is a required question by default, and the others are optional. You can de-select any of these existing questions by clicking on the grey box that contains the question, and you can change whether it is required or optional by selecting the checkbox next to “required”.

If you would like to add additional custom fields, like “Please provide your student number” or “What is your question?”, you can do so from the “+ Add a question” button at the top.

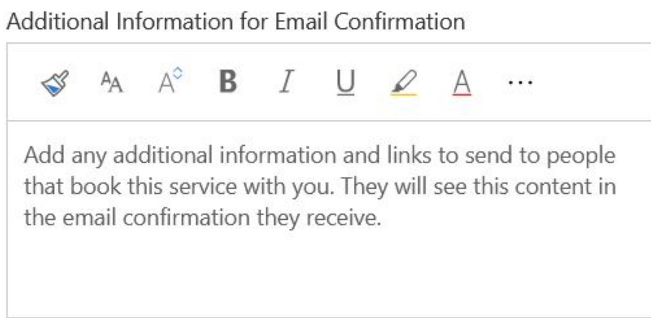


Reminders and Confirmations



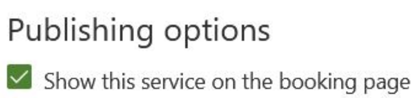
The Bookings system will automatically handle sending reminders to the people that have booked with you. By default, a reminder is sent 1 day in advance, but you can add more reminders (a 1 hour reminder is often very helpful) by clicking “Add an email reminder” and selecting your desired settings for the reminder. You can also customize the text in the reminder, which is recommended since the default text is somewhat vague.

You can also optionally add text to the automatic confirmation email that is sent when someone books with you.



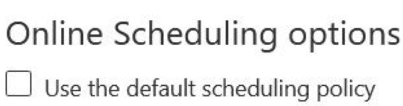
Publishing options

This option must be **on** for your service to show on your Bookings page and be bookable.



Online Scheduling options

If this option is **on**, this service will follow the default scheduling policy as set in the Booking Page area, and all the following options will be greyed out and cannot be changed. If it is **off**, the service will ignore the default settings, and use the settings that follow.

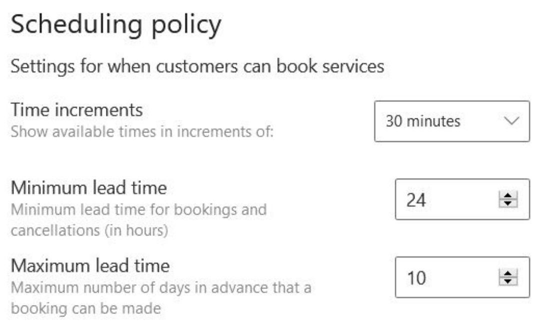


Scheduling policy

Time increments: set this to the duration of your meeting, plus any buffer time. So if you set a meeting duration of 10 minutes, and a 5 minute buffer after, set the time increments to 15 minutes.

Minimum lead time: how much notice do you need before meeting with someone? Common settings are 12 hours or 2 hours, but it may vary for you. Note that this setting is in hours.

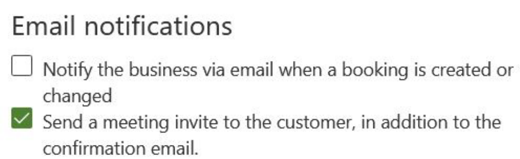
Maximum lead time: how far in advance will you allow someone to book with you? Generally, you will want to keep this set to 14 days or fewer. Note that this setting is in days.



Email notifications

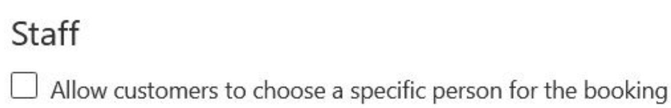
"Notify the business…" should generally be turned off. By default, when someone books with you, both you and them will receive an email. This option generates a third email and sends it to the email address specified in the **Business information** area.

"Send a meeting invite…" should generally be turned on. This sends a calendar invite so that your meeting can easily be added to someone's calendar.



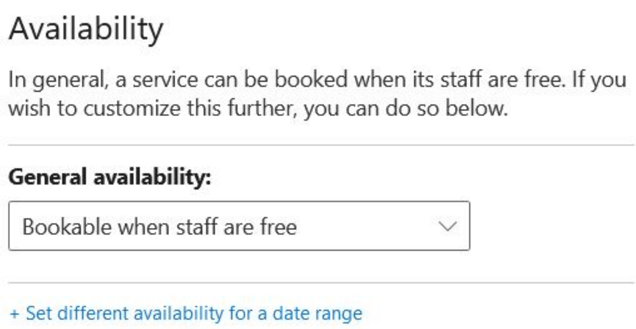
Staff

This option should be off, unless you have multiple staff members on your team that meet with people, and you'd like the people trying to book with you to be able to select between those staff members.



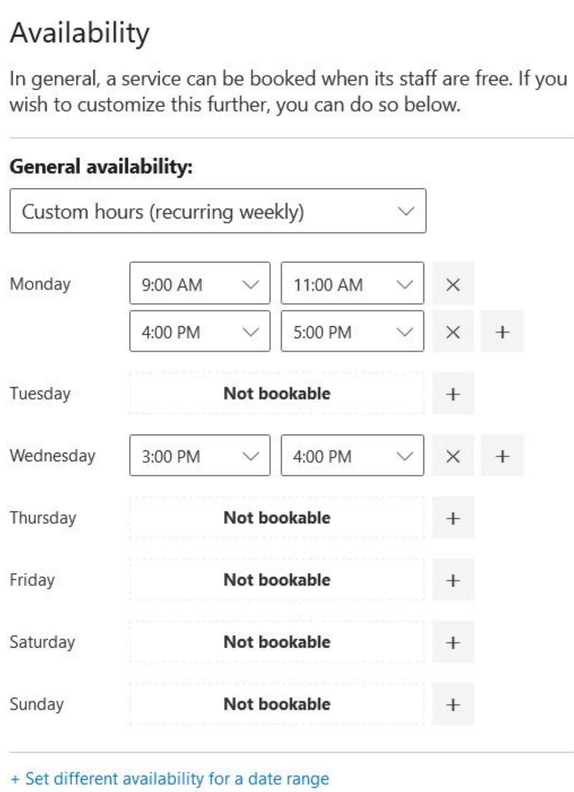
Availability

This is where we narrow down the time slots that are available for booking. By default, the **General availability** is set to "Bookable when staff are free", but it is common to only accept meetings during certain time slots on certain days. To set that up, change the **General availability** drop down to "Custom hours (recurring weekly).



Once you have changed that setting to “Custom hours (recurring weekly)”, more options will appear, and you can build your schedule for this service. To remove a time slot, use the X next to it, and to add an additional time slot, click on the + next to the day you would like the additional slot. For example, we see below a schedule that only offers meetings 9-11am and 4-5pm on Mondays and 3-4pm on Wednesdays.

Note that by default, Bookings will also respect your free / busy status in Outlook calendar, so if you have an event or meeting in Outlook that is set to “Busy” during your regularly bookable time slots, the Booking page will not offer that time slot as available.



Assign Staff

In the case of office hours, you are probably the "staff" person that will be meeting with the students. Click your name from the Assign Staff selector to assign yourself to the service.

Once you are done, click "Save" at the top of the screen to create your service. Don't forget to delete the "Initial consult" service, by hovering over it and clicking the trash can icon that appears. Be careful to delete the correct service – not the new one that you just created!

Finishing up and getting help

Test your Booking page by browsing back to "Booking page" and clicking on **Open published page**. This will open your Booking page in a new browser tab so that you can verify that the time slots are showing up as expected.

If everything is as expected, then you are ready to share your Booking page link with your students.

Still need some support? You can book a personal 30-minute Q&A and set up help session here: https://mcgill.ca/x/4sV