New Bookings User Guide

Requesting a license 2
Logging into Bookings 2
Setting Business Information 2
  Basic details 3
Setting Booking Page 4
  Configure booking page 4
  Manage your booking page 5
Staff 8
  Roles on new Bookings 8
  Add staff 9
  Edit staff 10
Custom Fields 11
Services 12
  Basic details 12
  Availability options 14
  Assign staff 15
  Custom fields 16
  Reminders and notifications 17
  Publishing options 17
Finishing up and getting help 18

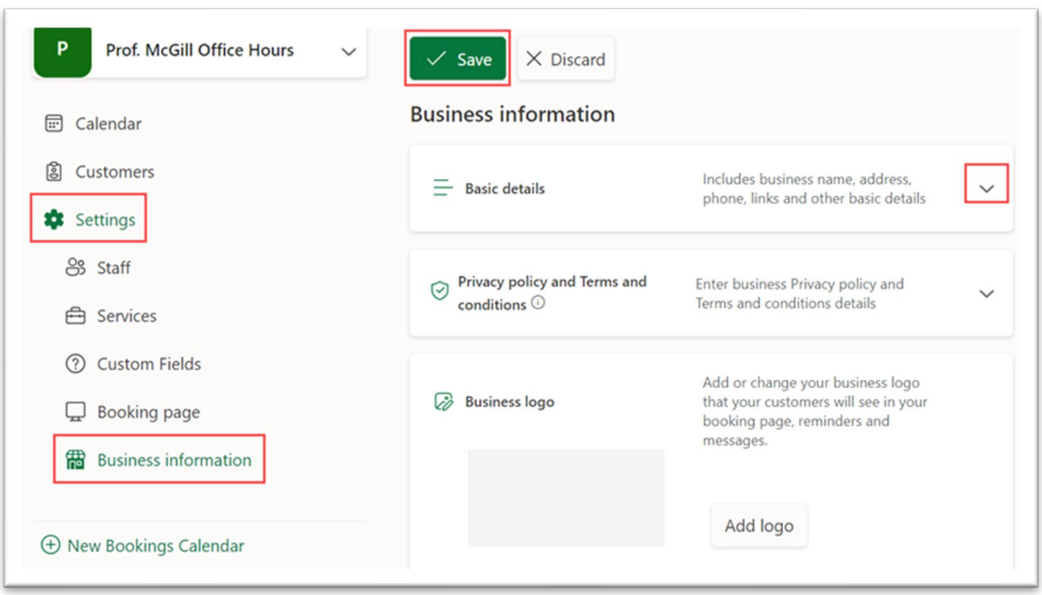
Requesting a license

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 confirming when your license is active.

Logging into 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 name for your calendar, e.g. "Prof. McGill Office Hours". You do not need to select a Business Type.

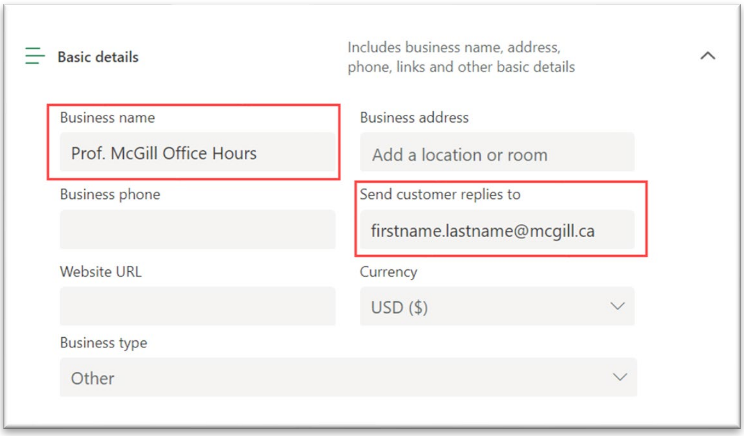
Setting Business Information



In the Settings tab, we will start the configuration of your site with Business information.

Click the down arrow on the right end of each section to show hidden fields for details.

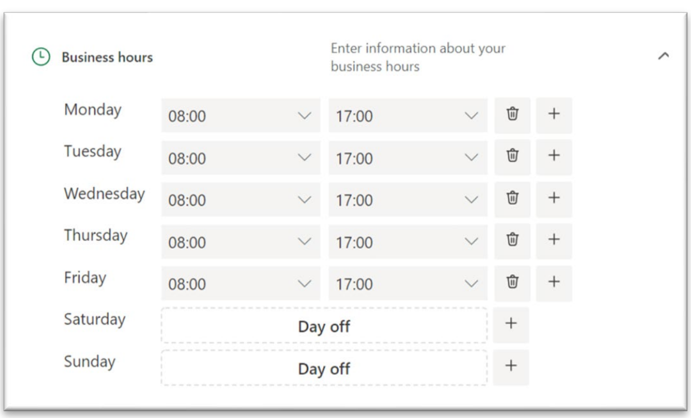
Basic details



Business name 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, 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 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.

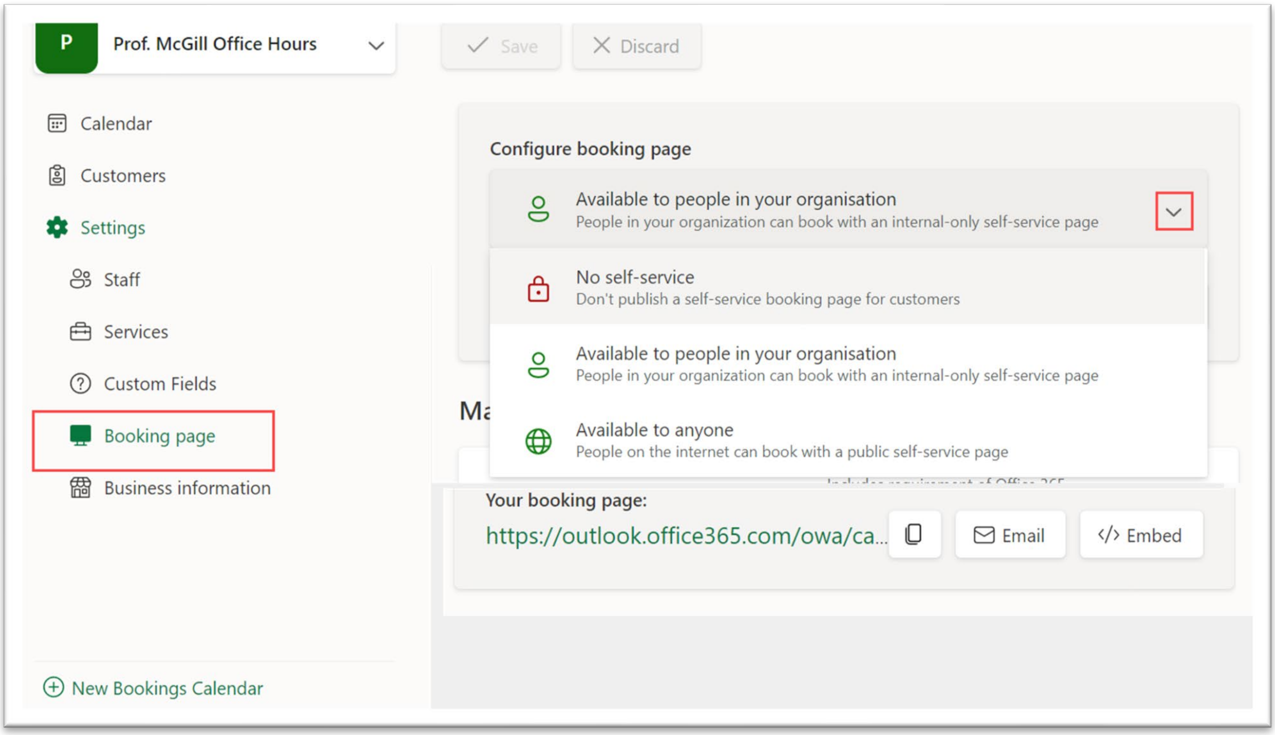
Business hours



This is the widest set of hours that you want your available timeslots to be between. 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” at the top of the page.

Setting Booking Page



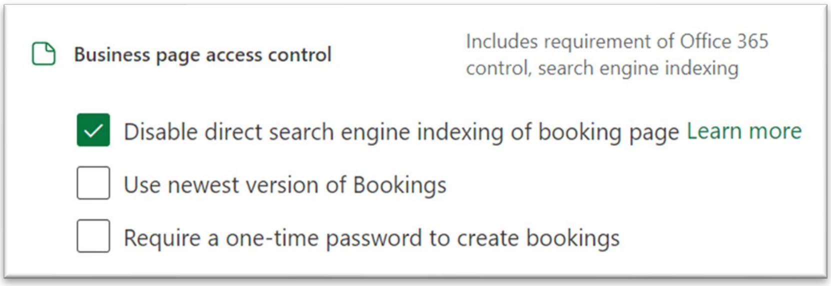
Configure booking page

There are three status of the booking page:

- **No self-service**: the public-facing page is unavailable, so no customer can book any services.
- **Available to people in your organization**: 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, e.g. prospective students, community partners, you should ensure this option is not selected.
- **Available to anyone**: anyone on the internet can book your services

The URL of your booking page is automatically generated based on your business name. You can click on the clipboard button to copy the link, share the link via email, or embed the booking page on a website with HTML or IFrame code.

Manage your booking page



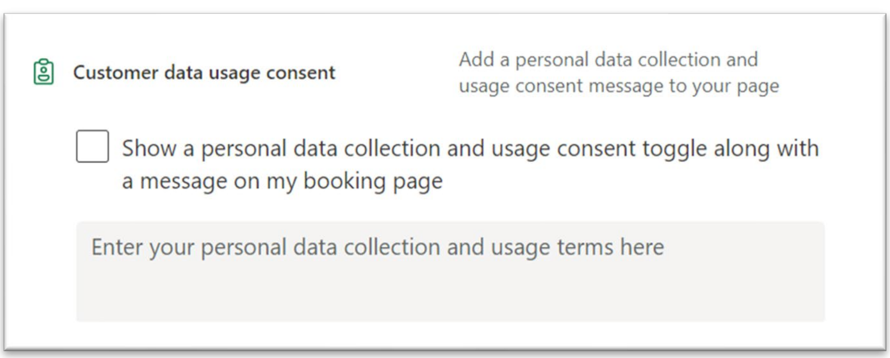
Business page access control

This set of options controls which users can access your booking page.

Generally, you will want to enable (checkmark in the box) the first 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 chance of random people or bots making false Bookings with you.

If you would like to enforce security on your site and to confirm the person booking your service is not a robot, you can check the third option: Require a one-time password to create bookings. Then your customers will need to enter their email address. The system will send a one-time password to the user, which needs to be entered on your Booking page before the appointment is booked.

Customer data usage consent



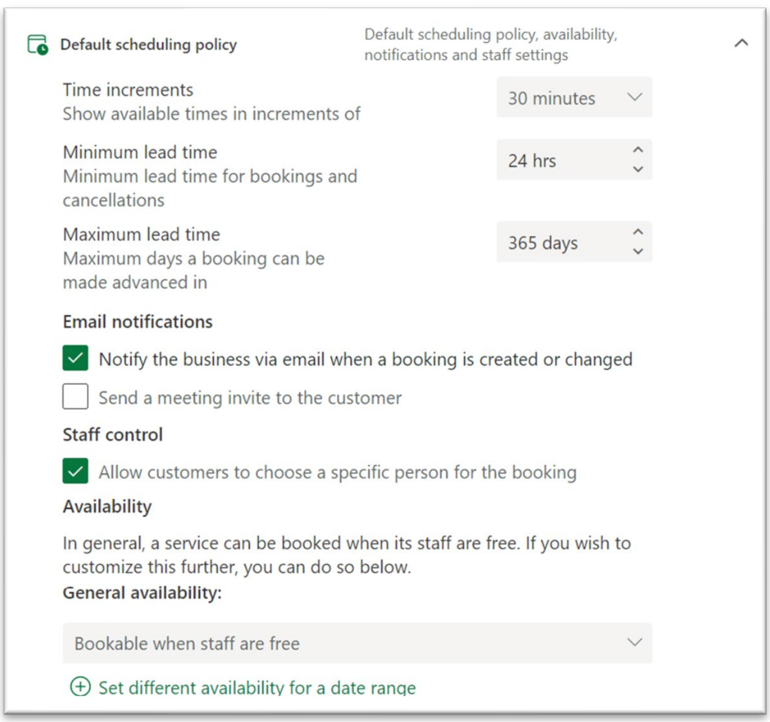
When we are using services “on the cloud”, meaning that they are not hosted at McGill, we always need to consider the McGill Cloud Directive. This will make sure that we are protecting our data, McGill’s data, and our student’s data, as well as everyone’s privacy and security. You can learn more about 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.

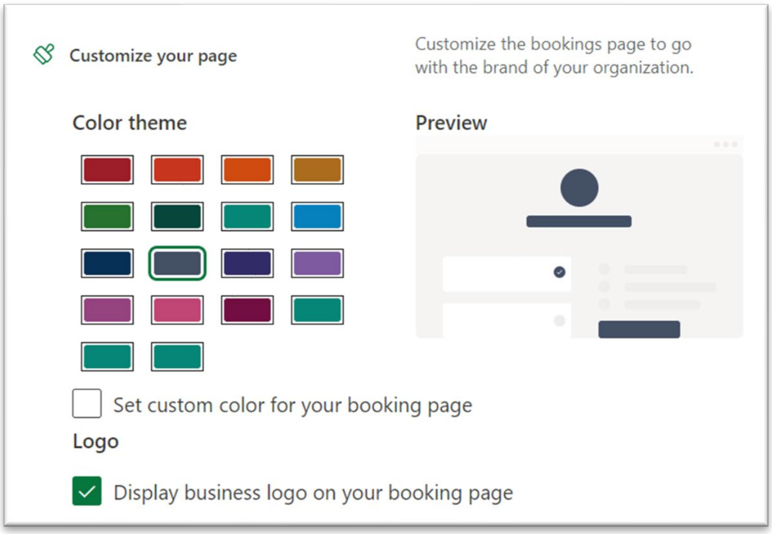
If you will not ask personal health questions, you do not require the notice or consent toggle.

Default scheduling policy



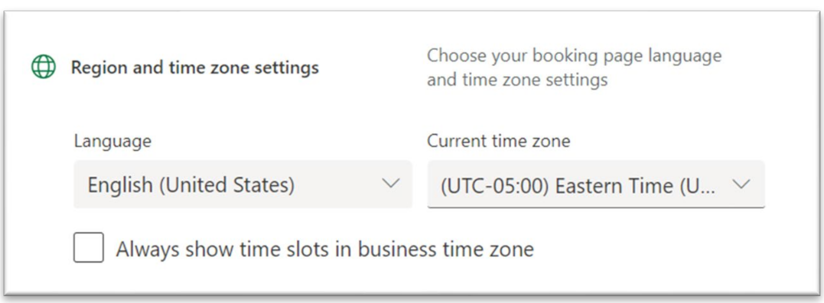
This is the default scheduling policy for your Bookings page. If you intend to offer multiple types of appointments with similar scheduling parameters, this is a good place to set those, but we usually need to set these on a service-by-service basis, so it is not mandatory to adjust them here. We will introduce more of these settings in greater detail in the Services section.

Customize your page



You can use this set of options to choose from a pre-selected set of colour themes, 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.

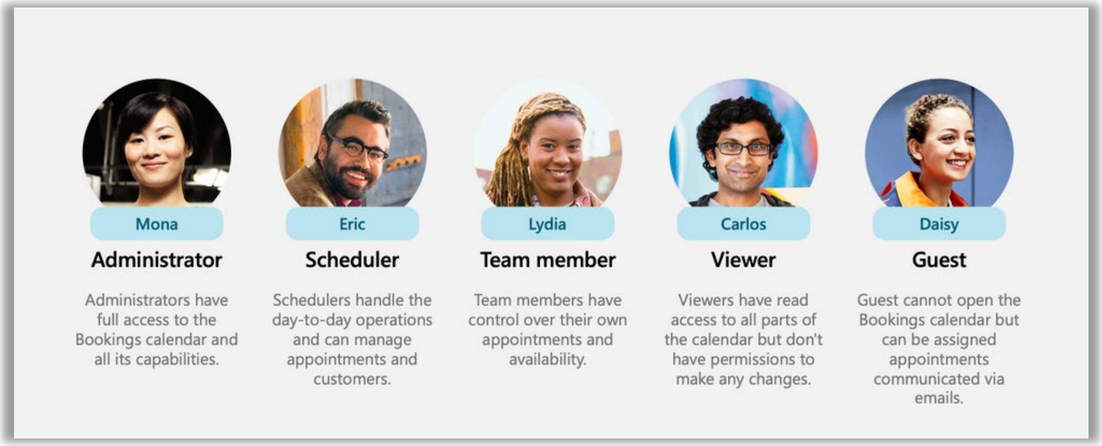
Region and time zone settings



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.

Staff

Roles on new Bookings



There are five roles in the new Bookings:

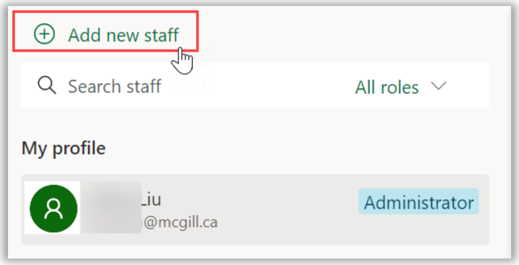
- **Administrator**: Administrators can edit all settings, add and remove staff, and create, edit, and delete bookings.
- **Scheduler**: Schedulers can manage bookings on the calendar and customer details. They have read-only access to settings, staff, and services
- **Team member**: Team members can manage bookings on their own calendar and their availability in the booking mailbox. When adding or editing a booking in their calendar, they'll be assigned as staff.
- **Viewer**: Viewers can see all the bookings on the calendar. They can't modify or delete them. They have read-only access to settings.
- **Guest**: Guests can be assigned to bookings but they can't open the booking mailbox.

When your Bookings site is first created, you are the only staff on the site with an administrator role. At this point, you can proceed to add your team members to the Bookings site, or to edit your own staff details. Please refer to the following two sections for more information.

Add staff

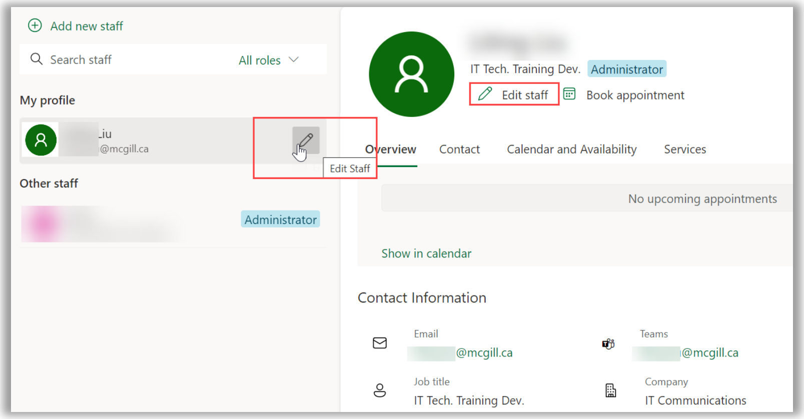
Follow the steps below to add staff:

1. On the page of Staff, Select the **Add new staff** button.

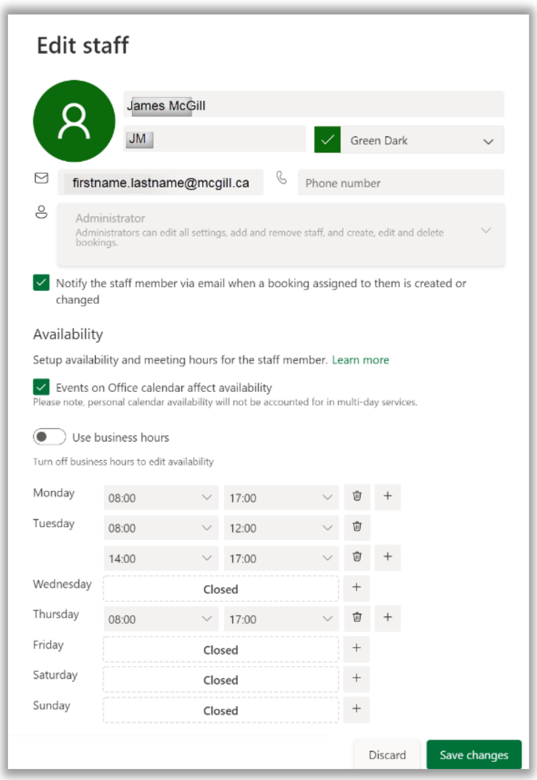


2. When adding staff from within your organization, type their name in the **Add people** field and select them when they appear in the drop-down menu. The other fields will automatically populate. To add staff from outside of McGill, manually fill in their email and other information.
3. For each staff member, select a role from the drop-down menu: **Administrator**, **Scheduler, Team member, Viewer, or Guest.**
4. Select **Notify all staff via email when a booking assigned to them is created or changed** to enable staff emails.
5. Select **Events on Office 365 calendar affect availability** if you want the free/busy information from staff members' calendars to impact availability for bookings services through Bookings.
   For example, if a staff member has a team meeting or a personal appointment scheduled for 3pm on a Wednesday, Bookings will show that staff member as unavailable to be booked in that time slot. We recommend leaving this setting on (it is turned on by default) to avoid double-bookings and to optimize the availability of your staff members.
6. Select **Use business hours** to set all bookable times for your staff members to be only within the business hours that you set in the **Business hours** section on the Business Information page.
   By deselecting this box, staff can be given custom hours that further limit when they can be booked. This is helpful for scenarios where a staff member may only be on site Tuesdays and Wednesdays, or they dedicate their mornings for one type of appointments, and their afternoons for other types.
7. Click **Save changes**. An email will be sent to the staff asking for their approval to be added to your Bookings site.

Edit staff



To customize your availabilities, you can hover the mouse over your name then click on the pencil icon  to **Edit Staff**, or you can highlight your profile, then click the pencil icon **Edit Staff** below your job title to open the following pop-up window.

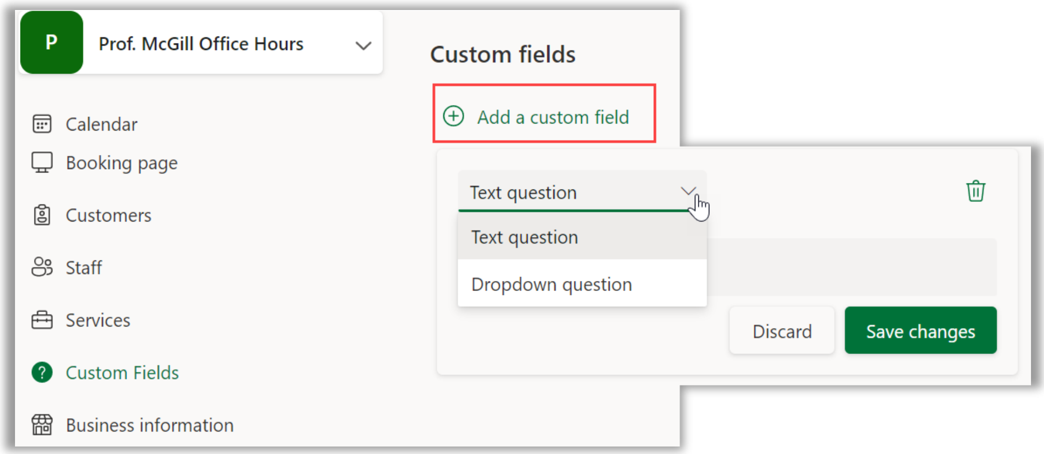


Please refer to step 3 to 7 in the previous section of [Add staff] to customize the fields on this page.

Custom Fields

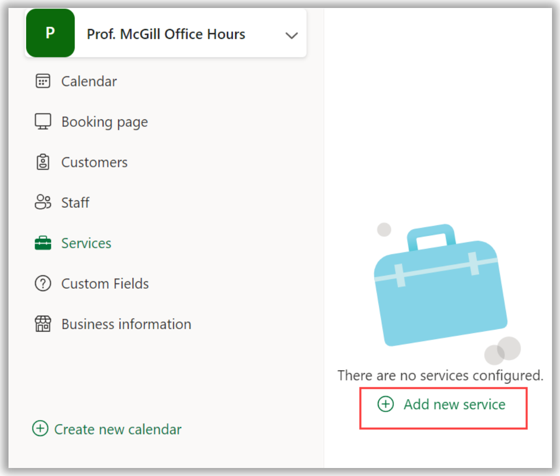
Professors can have office hour sessions for many scenarios, such as thesis and project discussions, feedback sessions or general information sessions. A very useful feature to better prepare for the meeting in advance is custom questions. Professors can ask students more targeted questions, such as areas of interests while they book an appointment.

Click Add a custom field, select **Text question** or **Dropdown question**, then enter the question details. Click **Save changes** to save the question.

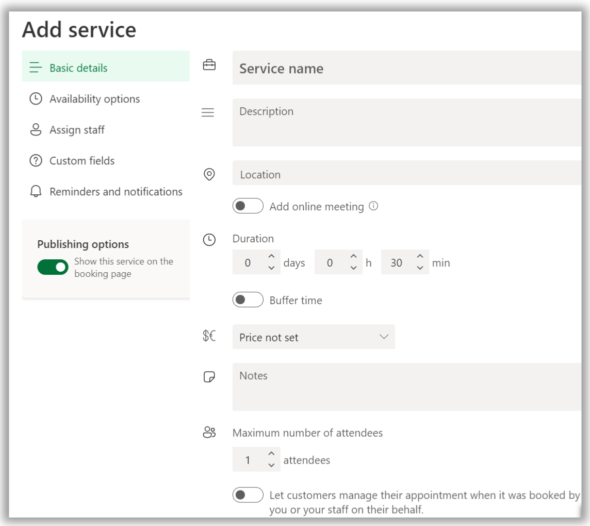


Services

When your site is first created, there is no service. To add your first service, click on the plus sign “Add new service”.

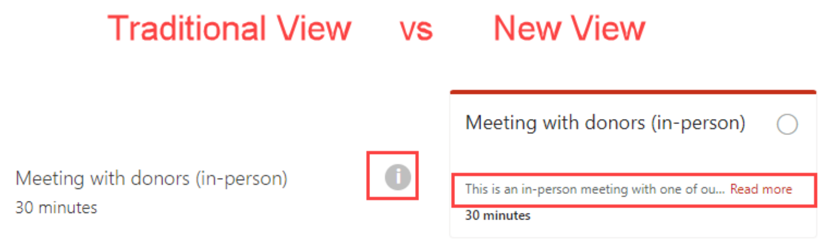


Basic details



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

- **Description**:
  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.)



- **Location**:
  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.

- **Duration**:
  The duration, in Days, Hours, and Minutes is the length of time that you would like to be booked for the formal meeting.

- **Buffer time**:
  This 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. Five minutes after each meeting is a common choice.

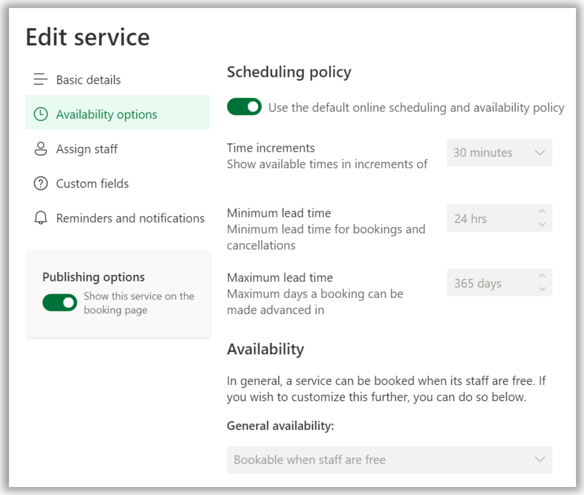
- **Price and Notes**:
  You can leave both as default – Price not set (otherwise, pricing information will appear on your service), and no notes (because these notes are not visible to the user).

- **Maximum number of 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?

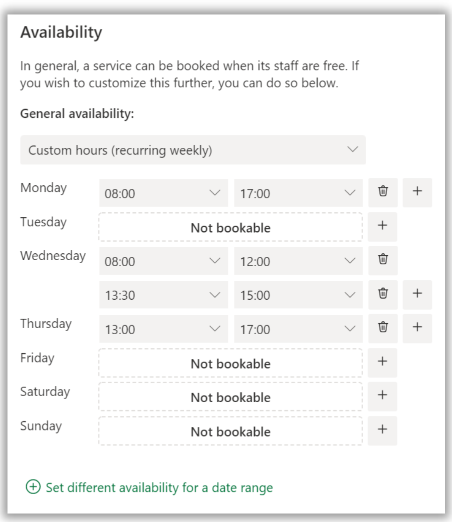
  If you select one attendee, only one person will be able to reserve each slot that you make available, though more people can be invited to the meeting itself by forwarding the email confirmation or calendar invite. You will not be able to adjust this setting after you finish creating the service.

  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 one.

Availability options



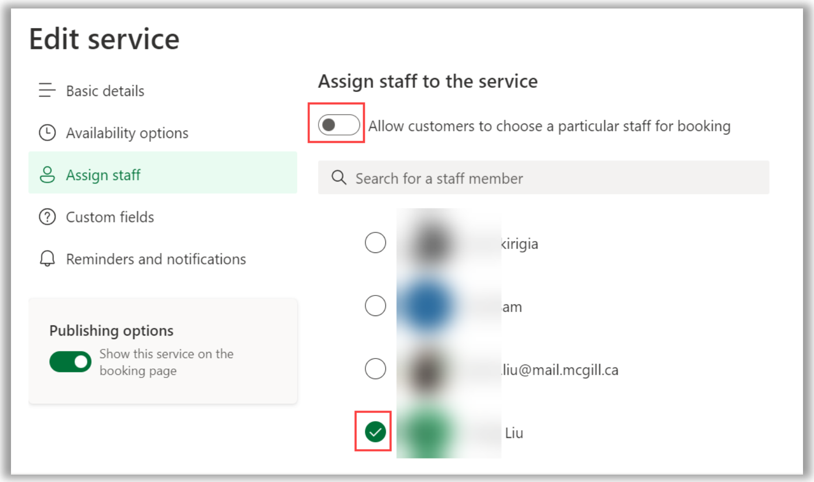
- **Scheduling policy**:
  If this option is on, this service will follow the default scheduling policy as set in the Booking Page area, and all the following options will be greyed out and cannot be changed. If it is off, the service will ignore the default settings, and use the settings that follow.
- **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 trash bin 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 above a schedule that only offers meetings 8am – 5pm on Mondays, 8am – 12pm and 1:30 – 3:00pm on Wednesdays, and 1-5pm on Thursdays.

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" or "Tentative" during your regularly bookable time slots, the Booking page will not offer that time slot as available.

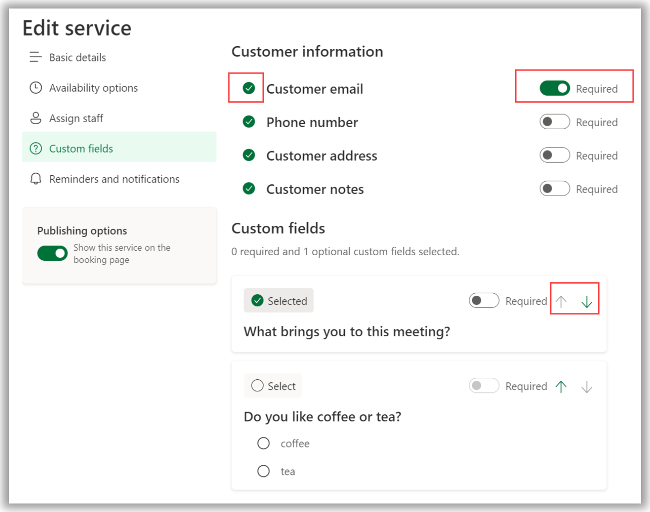
Assign staff



Allow customers to choose a particular staff for booking is greyed out, unless you have multiple staff members assigned to provide the service. If you'd like the people trying to book with you to be able to select between those staff members, you should toggle this option on.

To assign staff to provide the service, simply put a checkmark in front of their name. If the staff you are looking for is not on this list, it likely that they haven't approved to be added to this Bookings site and their status is "Not bookable". In this case, you may want to remind the staff about clicking on the hyperlink in the activation email they received.

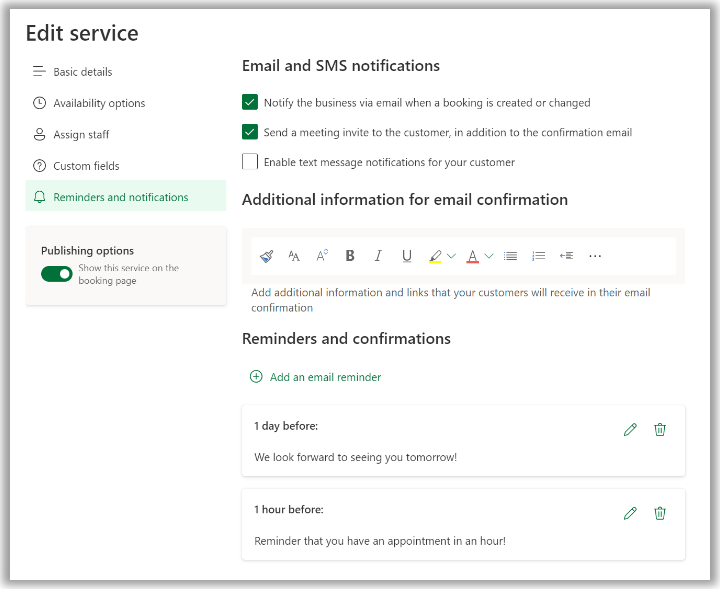
Custom fields



This is where you may collect more information about the person that would like to book with you. You will see the default four questions on Customer information: Customer email, Phone number, Customer address, and Customer notes. The customer email is a required question by default, and the others are optional by default. You can deselect any of these existing questions by unchecking the checkbox in front of the question. You can also change whether it is required or optional by toggle the switch next to “required”.

The questions you created earlier will show up in the section of Custom fields. You can select multiple additional custom fields like “What brings you to this meeting?” or “Do you like coffee or tea?”, and change the order of questions using the up and down arrow on the right-hand side.

Reminders and notifications



The Bookings system will handle automatically 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.

Finishing up and getting help

Test your Booking page by browsing back to “Booking page” and clicking on the URL of your Booking page to open it in a new tab on your browser, 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