Niagara College Canada

APPLIED DREAMS.

Microsoft Bookings

User Guide

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Overview

Accessing Microsoft Bookings

To access Microsoft Bookings, login to the Niagara College portal (https://portalnc.niagaracollege.ca/) and click on **More Applications**

Expand the **Microsoft O365** heading
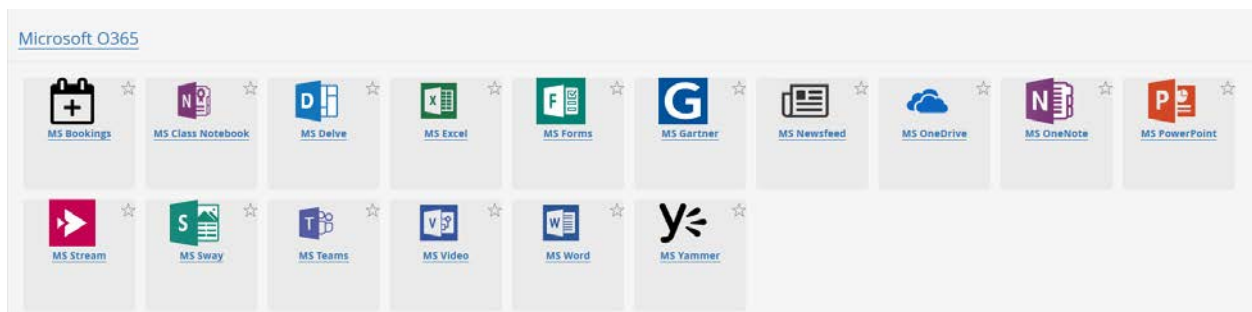
Click on **MS Bookings** icon to open the application. If this is your first-time opening MS Bookings, a prompt will appear to search for or add a new business. Create your business with a meaningful name, choose the type **Colleges and Universities** and click **Continue**.
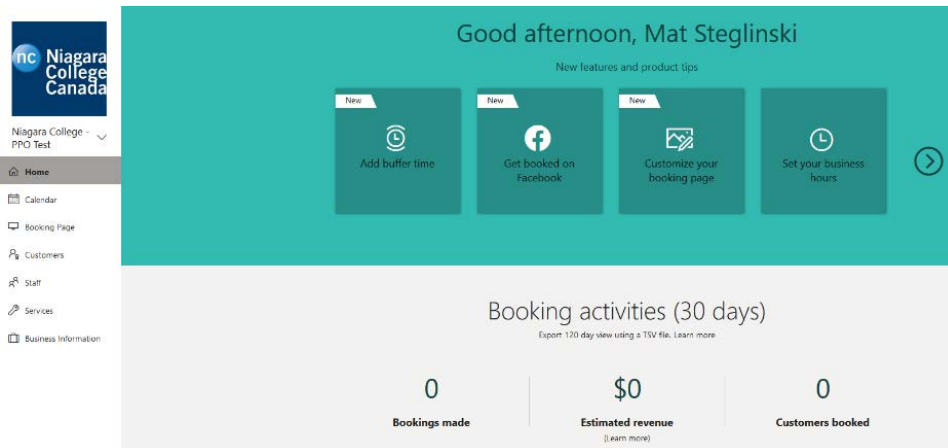

Note: The name you enter for the business should be unique and have a clear purpose that staff and students will understand (Example: User Services – Support Appointments)
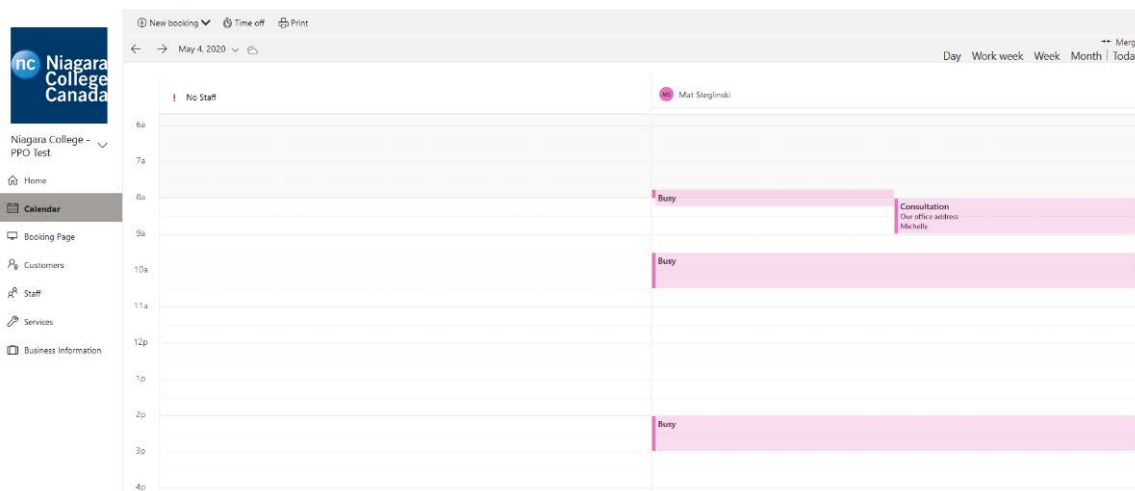
Configuration

Home Screen

The **Home** screen displays a summary of recent bookings as well as quick links to update your bookings site.

Calendar

The calendar view shows you your staff calendars by day, week or month and the appointments that have been scheduled for them. From this screen you are also able to create appointments through the backend using the **New Booking** option.

🖫 Save   🗑 Discard

Customer information

Enter customer and service information

Customer name

Customer email

Phone number

Customer address

Customer notes

Edit customer details and notes

☐ Don't send customer an email confirmation.

☐ Enable customers to manage their appointment when it was booked by you or your staff on their behalf.

☑ Send a meeting invite to the customer, in addition to the confirmation email.

Service details

Consultation	⌄

Start

5/4/2020	🗓	11:00 AM	⌄

End

5/4/2020	🗓	11:30 AM	⌄

☐ All day event

Buffer time your customers can't book

◉ Off

Our office address	✕

🌐 This is an online meeting

Price not set	⌄

Are you a staff member or a student?

Staff	⌄

Department:

This is where you can add notes about this service that only you and your staff see.

1 day : Just a reminder we have an appointment…   ⌃   ✎   ✕

Add an email reminder

Staff

Choose one or more staff for the service

| MS	Mat Steglinski	✓
	No conflicts	

Booking Page

On the **Booking Page**, you can define the appearance and rules for your business landing page as well as publish your appointment booking page to the web. Under **Booking Page Status,** you can **Save and**

Publish the site, copy the URL to share it and **Open the Published** Page to preview how it looks and functions.

Tip: To publish the appointment booking link in **Blackboard**, navigate to the area where you want the link posted and with **Edit Mode** on

Edit Mode is: ● ON

Click on **Build Content** and then **Web Link**

Build Content ∨

Create

Item

File

Audio

Image

Video
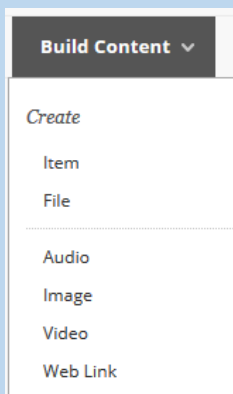
Web Link

In the window that pops up, give the link a name (Example: "Book an Appointment") and paste the URL from MS Bookings as the link.
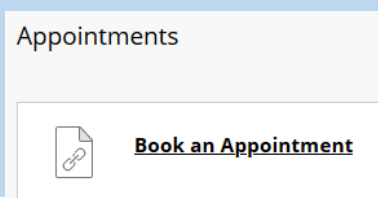
WEB LINK INFORMATION

* Name   Book an Appointment

* URL   CollegeTest@ncstudents.niagaracollege.ca/bookings/
                  For example, http://www.myschool.edu/
                  ☐ This link is to a Tool Provider.   What's a Tool Provider?

Click **Submit** to save and publish the link.

Appointments

🔗 **Book an Appointment**

Other options on the **Booking** Page include:

- Color Scheme

Tip: Header color should be set #FFFFFF (White) and the highlight color can be one of:

#0077BE (NC Blue)
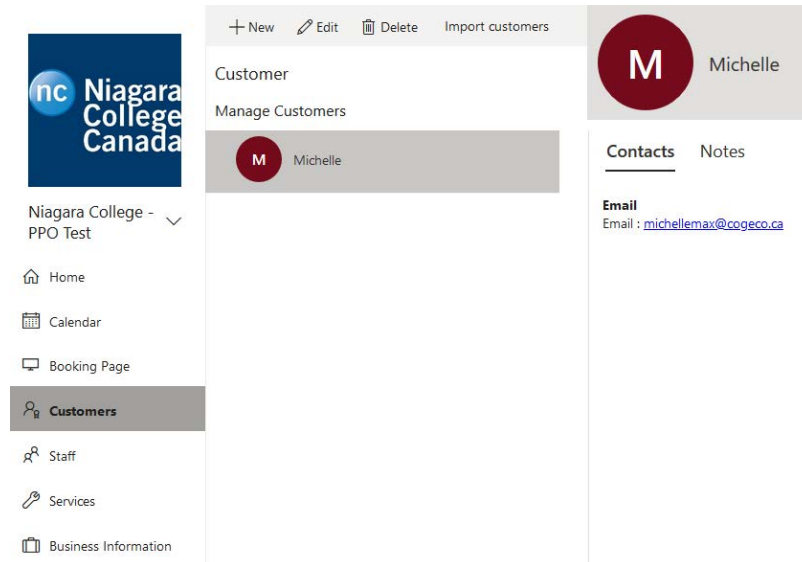#003A6C (Dark Blue)
#262626 (Dark Grey)
#DADADA (Light Grey)

- Requiring users to have an Office 365 account to book an appointment

Tip: Recommended to select this option if you only want Niagara College staff and students to be able to book appointments
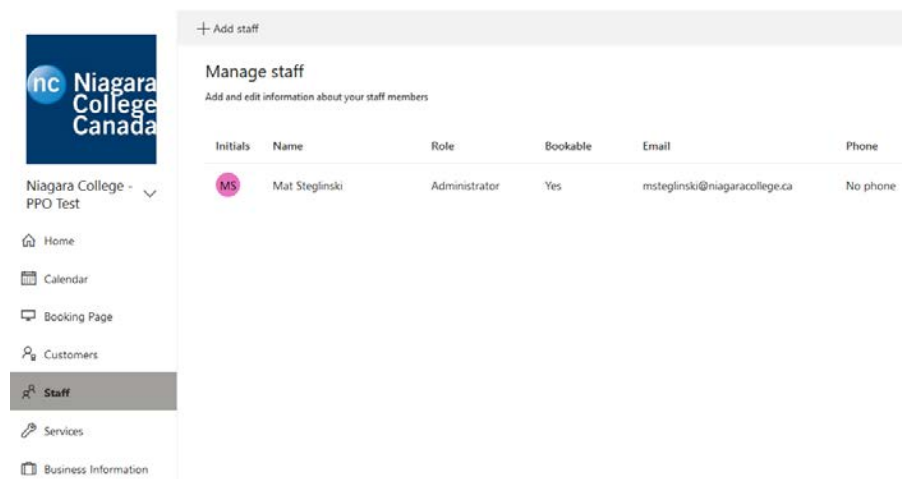
- o Time increments
- Email notifications
  - o Sending a meeting invite to the customer
  - o Emailing business when appointment created or changed
- Staff
  - o Allowing customers to pick which staff member they want to meet with
- Availability
  - o Set the availability for your services
  - o Options include:
    - Bookable when staff are free
    - Not bookable
    - Custom availability (Set specific hours when the appointments can be booked)

Customers

On this page you can view, create, edit and import (via CSV) customers. You are also able to add notes to a customer record for other internal staff to see.

Staff

The **Staff** screen lets you manage the staff who will be bookable for the services you offer. Staff can have three different levels of access:

- Administrator
  - o Can edit all settings, add, or remove staff members and create, edit and delete bookings
- Viewer

- o Can see all the bookings on the calendar but cannot edit or delete
- Guest
  - o Can be assigned to bookings but cannot view the bookings mailbox

Services

The **Services** page lets you add, edit, or delete the services offered by your area.

Save   Discard

Service details

Share your page for this service

Share a booking page URL specifically for this service

https://outlook.office365.com/owa/calendar/NiagaraColle...

Share via Email   Copy

Enter information about your service

Service name

Project Request

Description

Schedule a meeting to discuss a new project for your department

Default location

Teams Meeting   ✕

🔘 Add online meeting ⓘ

Default Duration

Days [0 ▾]   Hours [1 ▾]   Minutes [0 ▾]

Buffer time your customers can't book

⚪ Off

⚪ Enable customers to manage their appointment when it was booked by you or your staff on their behalf.

Maximum number of attendees per event

Maximum Attendees [5 ⬍]

Default price

[Price not set ▾]

Notes (internal only)

Custom Fields

0 required and 1 optional custom fields selected. You can modify the selected fields below.

Modify

Reminders and Confirmations

1 day : Just a quick reminder that your ser... ⌃ ✎ ✕

Add an email reminder

Additional Information for Email Confirmation

🖌 ᴬA Aˢ **B** *I* U̲ 🖍 A ⋯

Add any additional information and links to send to people that book this service with you. They will see this content in the email confirmation they receive.

Assign Staff

MS Mat Steglinski   ✓

Publishing options
☑ Show this service on the booking page

Online Scheduling options
☐ Use the default scheduling policy

Scheduling policy
Settings for when customers can book services

Time increments
Show available times in increments of: 30 minutes ⌄

Minimum lead time
Minimum lead time for bookings and   12   ⬍
cancellations (in hours)

Maximum lead time
Maximum number of days in advance that a   30   ⬍
booking can be made

Email notifications
☑ Notify the business via email when a booking is created or
  changed
☑ Send a meeting invite to the customer, in addition to the
  confirmation email.

Staff
☑ Allow customers to choose a specific person for the booking

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:

Bookable when staff are free   ⌄

+ Set different availability for a date range

The following options are available to configure your services:

- Service name, description, and location
- Online meeting
    - **Includes a link in the appointment to join a Microsoft Teams meeting**
- Default appointment duration
- Appointment buffers
- Maximum number of attendees
- Set required fields and create custom fields to include on the booking form

✓ Ok   + Add a question ⌄

Customer information

Select what customer details you want displayed on the booking page. Name is always required.

Customer email	☑ Required
Phone number	☐ Required
Customer address	☐ Required
Customer notes	☐ Required

Custom Fields

Select custom fields to add to the service.

| Are you a staff member or a student? | ☐ Required |
| Department: | ☐ Required |

Custom fields display order

Following is the current order of custom fields. To change the order, clear selection and reselect custom fields in the order you want.

Are you a staff member or a student?
Department:

- Configure email reminder text
- Configure scheduling policy or use the default settings configured on the Booking page

Business Information

Provide information for your department including name, address, phone, email, logo, and business hours.

Tip: Please save a copy of the following Niagara College logo to use on the appointment booking site.

https://www.niagaracollege.ca/360-booking-system/nc-logo-trans-pos.png

When uploading the logo, select the white background before **Saving**.
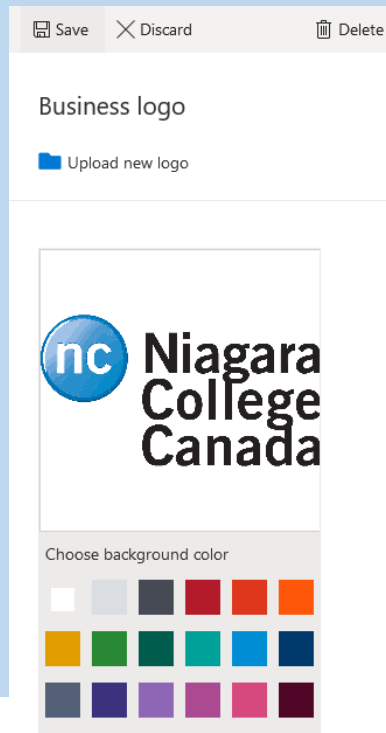
Deactivating the Booking Site

If you no longer require your Microsoft Bookings site, please request to have it removed by submitting an ITS Help Desk ticket here.

Booking Page

On the **Booking** page, customers can select from the services you have setup, choose a date, and select a time to book. They can then fill out their information and book the appointment.
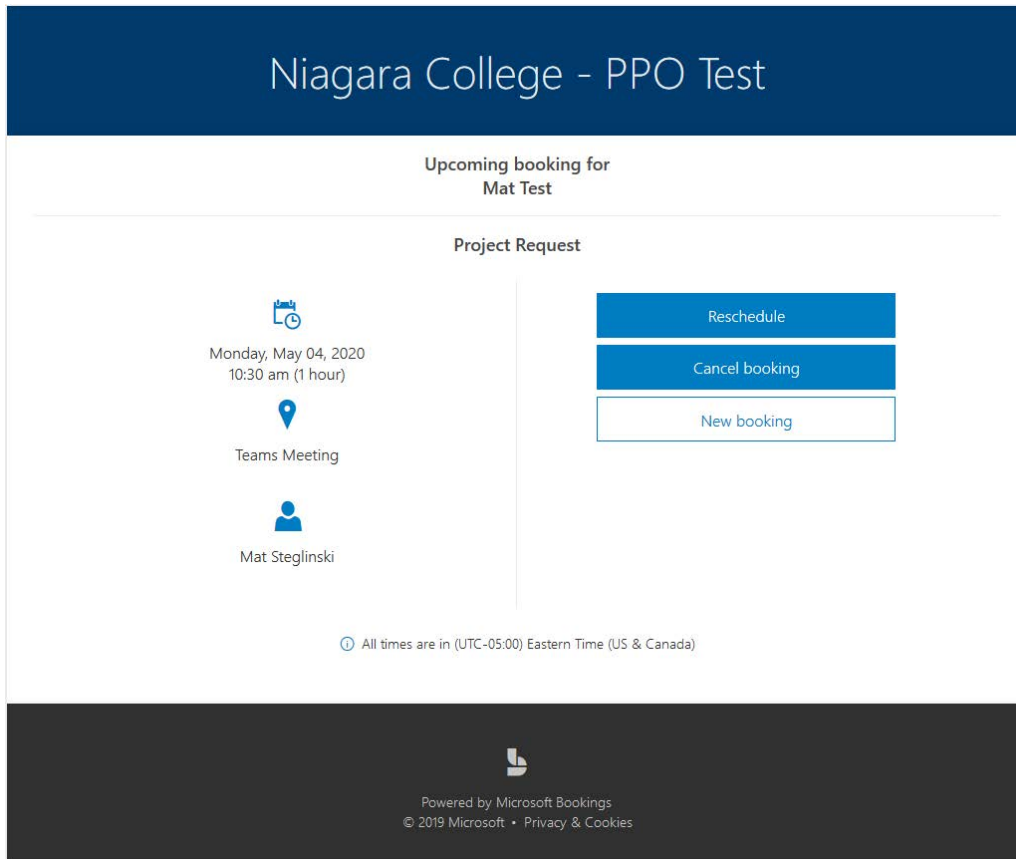
After booking the appointment, users can reschedule, cancel, or book another appointment.

Customers and the staff the appointment is booked with will receive a confirmation email that contains the details of the booking as well as a link to join an MS Teams meeting (If configured).
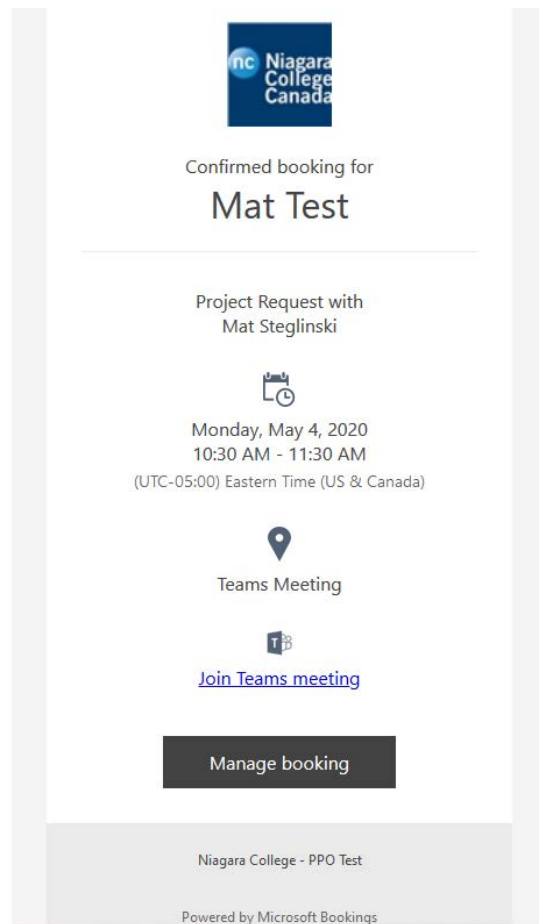
Customers will also receive a separate email to add the appointment to their appropriate calendar. For the staff who the appointment is booked with, the appointment will be automatically added to their Outlook calendar.
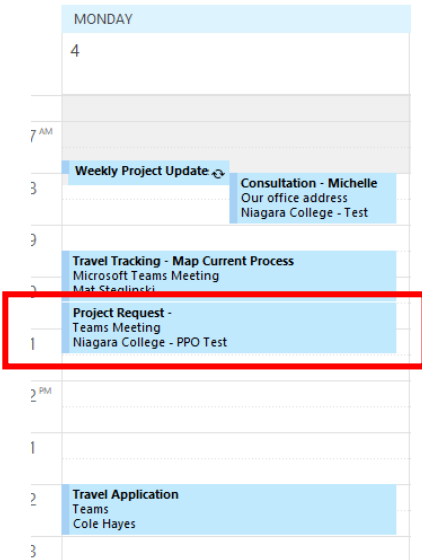
One day prior to the appointment, the user and the staff member will receive and email reminder that includes the date and time of the appointment:
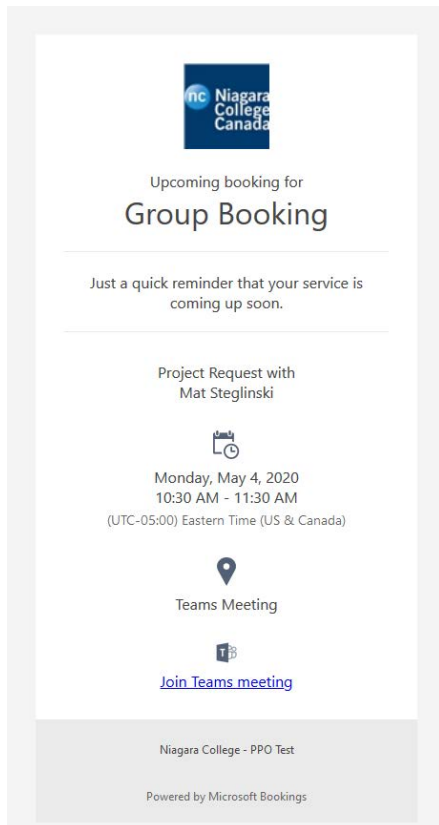
Appendix A – Document History

Major Revisions

Identify each published version.

Version	Date	Modified By	Description
1.0	7/20/2020	Mat Steglinski	Document Created