



**Niagara
College
Canada**
APPLIED DREAMS.

Microsoft Bookings User Guide

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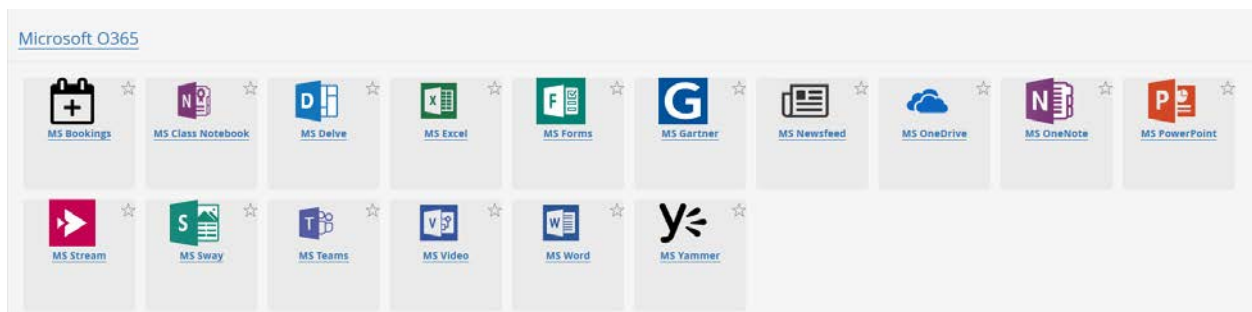
Overview

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**.

Welcome to Bookings

Tell us about your business

Business name

Colleges & Universities

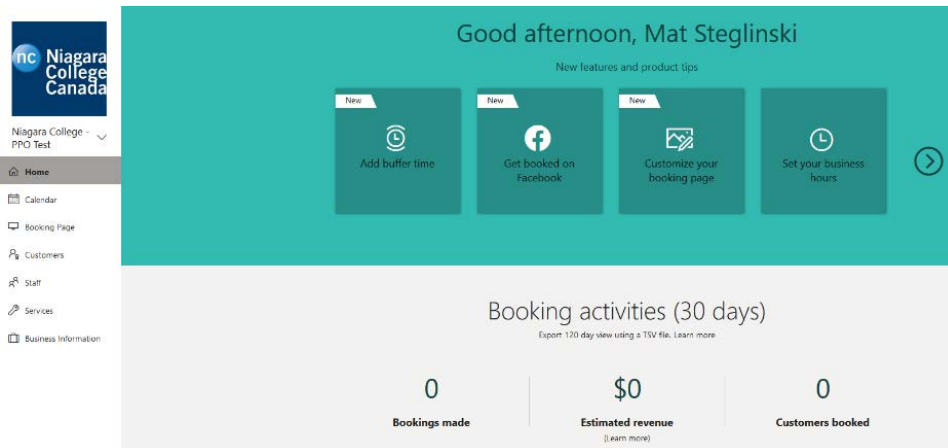
No thanks

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)

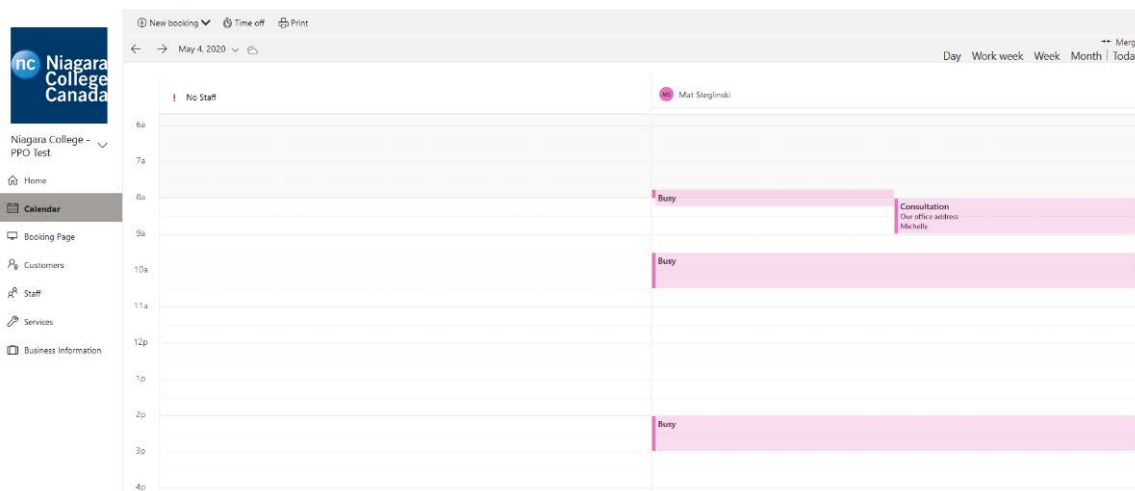
Configuration

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

Save and publish | Unpublish | Embed

Booking page status
Published Open published page

Share your page
https://outlook.office365.com/owa/calendar/NiagaraCollegeTest@ncst ...
Copy

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 organization to book.
 Disable direct search engine indexing of booking page [Learn more](#)

Customer data usage consent
 Show a personal data collection and usage consent toggle along with a message on my booking page
Enter your personal data collection and usage terms here.

Scheduling policy
Settings for when customers can book services

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 cancellations (in hours): 12

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

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

Availability during these dates:
Start: 5/1/2020 | End (inclusive): 5/6/2020
Bookable when staff are free

* Set different availability for a date range

Customize your page
Choose your color theme

Preview

Color theme

Set custom color scheme for your booking page

Highlight color: #007DC3 | Header color: #003a6c

Logo
 Display business logo on your booking page

Region and time zone settings
[Change language and time zone settings](#)
 Always show time slots in business time zone

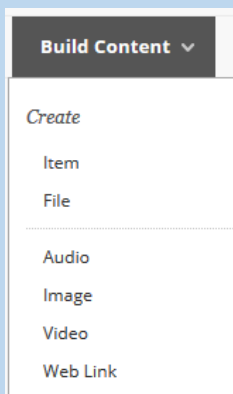
On the **Booking Page**, you can define the appearance and rules for your business landing page as well as publish your appointment booking page to the web. Under **Booking Page Status**, you can **Save and**

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**



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.

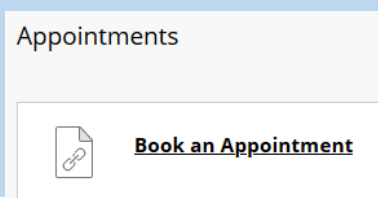
WEB LINK INFORMATION

* Name

* URL
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.



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)

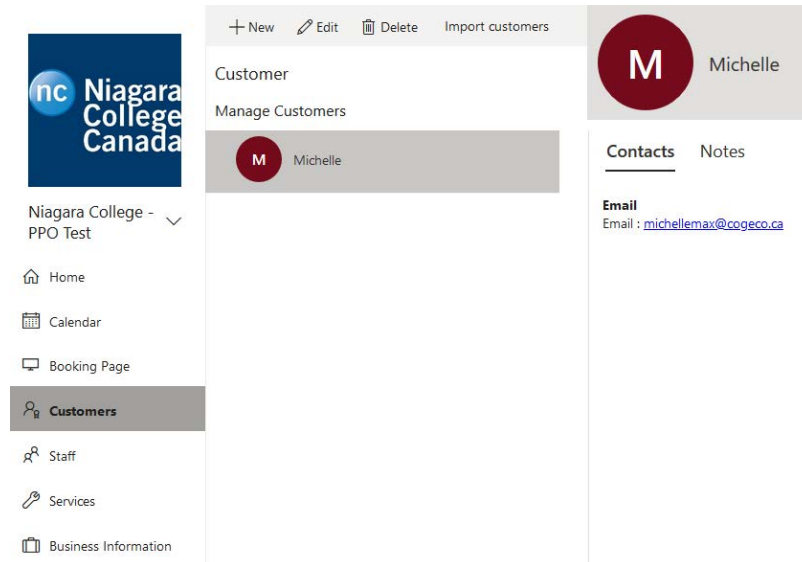
#DADADA (Light Grey)

- 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

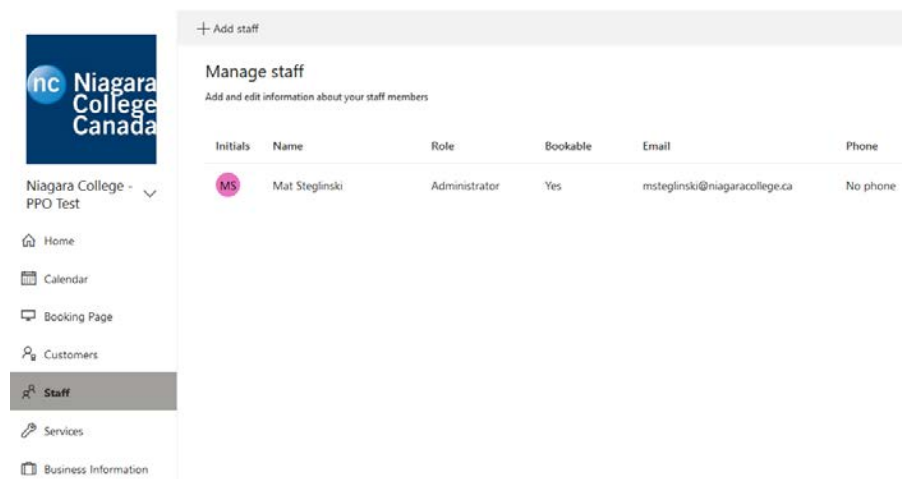
- Time increments
- Email notifications
 - Sending a meeting invite to the customer
 - Emailing business when appointment created or changed
- Staff
 - Allowing customers to pick which staff member they want to meet with
- Availability
 - Set the availability for your services
 - Options include:
 - 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



Initials	Name	Role	Bookable	Email	Phone
MS	Mat Steglinski	Administrator	Yes	msteglinski@niagaracollege.ca	No phone

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

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


Save Discard

Staff details

Enter information about your staff member

Membership information

Status: **New**
Staff member will be notified via email about their membership for this booking calendar.



TB

Guests can be assigned to bookings but they can't open the booking mailbox.

Availability

Settings and meeting hours for the staff member [Learn more](#)

Events on Office calendar affect availability

Please note, personal calendar availability will not be accounted for in multi-day services.


Use business hours

Monday	8:00 AM	5:00 PM	X	+
Tuesday	8:00 AM	5:00 PM	X	+
Wednesday	8:00 AM	5:00 PM	X	+
Thursday	8:00 AM	5:00 PM	X	+
Friday	8:00 AM	5:00 PM	X	+
Saturday	Closed			+
Sunday	Closed			+

Email notifications

Notify the staff via email when a booking assigned to them is created or changed

Services



Niagara College - PPO Test

- [Home](#)
- [Calendar](#)
- [Booking Page](#)
- [Customers](#)
- [Staff](#)
- [Services](#)
- [Business Information](#)

+ Add a service

Manage services

Create and edit your bookable services

Service	Duration	Default price	Payment required	Assigned staff
Consultation	1 hour	Price not set	None required	Mat Steglinski
Project Request	1 hour	Price not set	None required	Mat Steglinski

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

Share via Email
Copy

Enter information about your service

Service name

Description

Default location

Add online meeting

Default Duration

Days Hours Minutes

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

Default price

Notes (internal only)

Assign Staff

MS Mat Steglinski ✓

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

🔗 A A B I U 🖌 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.

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:

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

Maximum lead time
Maximum number of days in advance that a 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:

[+ 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	<input checked="" type="checkbox"/> Required
Phone number	<input type="checkbox"/> Required
Customer address	<input type="checkbox"/> Required
Customer notes	<input type="checkbox"/> Required

Custom Fields

Select custom fields to add to the service.

Are you a staff member or a student?	<input type="checkbox"/> Required
Department:	<input type="checkbox"/> 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

Business information

Enter an address and contact information for your business. This will be used on the booking form and in booking messages and reminders.

Business name

Business address

Business phone

Send customer replies to

Website URL

Privacy policy URL

Terms and conditions URL

Business type

Currency

Business logo

Add or change your business logo. This will appear in booking messages and reminders along with the business information you enter.



Business hours

Enter information about your business hours.

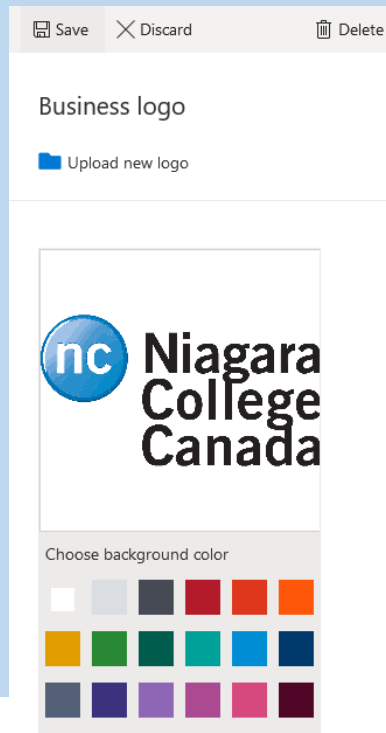
Sunday	Closed			+
Monday	8:00 AM	5:00 PM	X	+
Tuesday	8:00 AM	5:00 PM	X	+
Wednesday	8:00 AM	5:00 PM	X	+
Thursday	8:00 AM	5:00 PM	X	+
Friday	8:00 AM	5:00 PM	X	+
Saturday	Closed			+

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**.



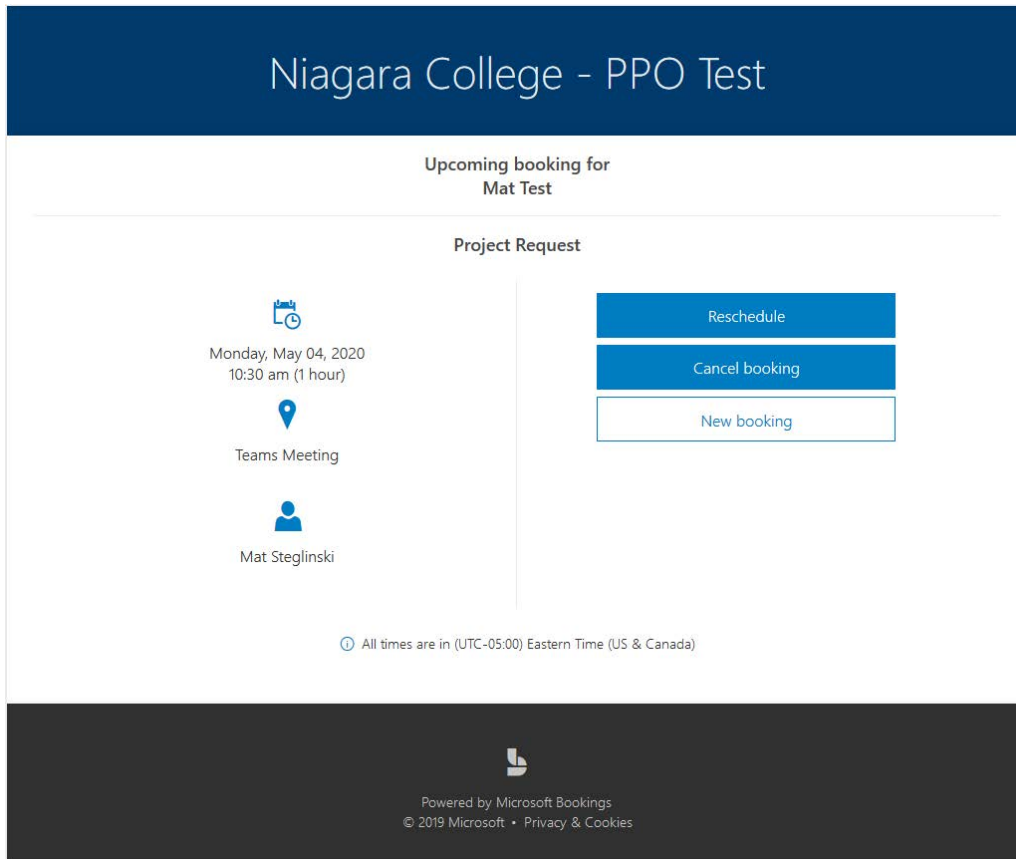
Deactivating the Booking Site

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

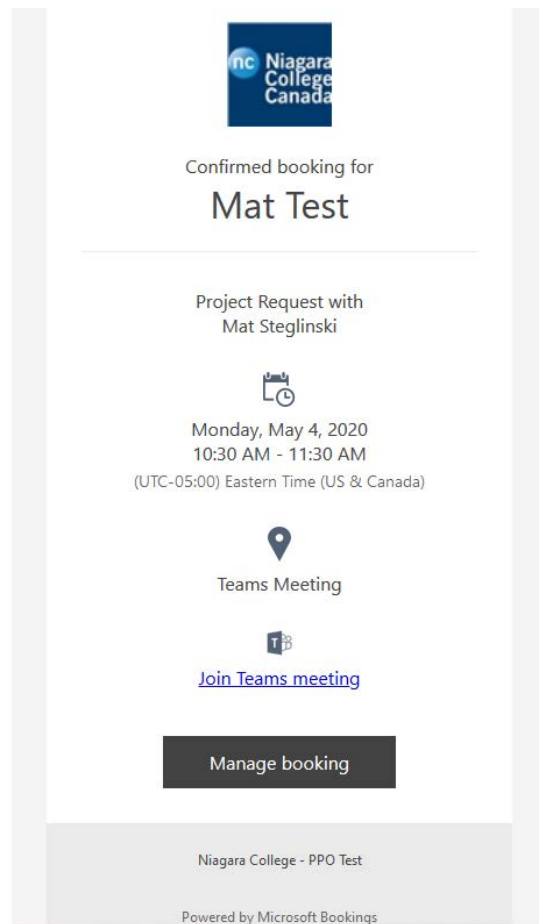
The screenshot shows the Microsoft Bookings interface for a service named "Niagara College - PPO Test". At the top, there are two service cards: "Consultation 1 hour" and "Project Request 1 hour", with the latter selected. Below this is a calendar for "May 04" with a grid of dates from 1 to 31. The date "4" is selected. To the right of the calendar is a "Select staff (optional)" dropdown menu currently set to "Anyone". Below the calendar is a table of available time slots for the selected date: 10:30 am, 11:00 am, 11:30 am, 12:00 pm, 12:30 pm, 1:00 pm, 3:00 pm, 3:30 pm, and 4:00 pm. Below the time slots is a section titled "Add your details" with input fields for Name, Email, Phone number (optional), and Address (optional). To the right of these fields is a "Notes (optional)" text area and a prompt: "Please let us know if you have any special requests. Thank you." Below this is a section titled "Provide additional information" with a "Department: (optional)" input field. At the bottom center is a blue "Book" button.

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.

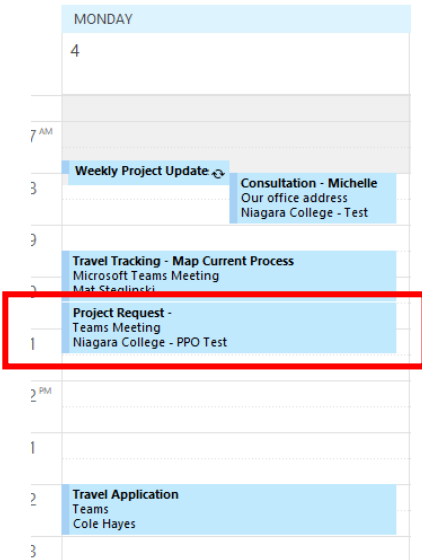


After booking the appointment, users can reschedule, cancel, or book another appointment.

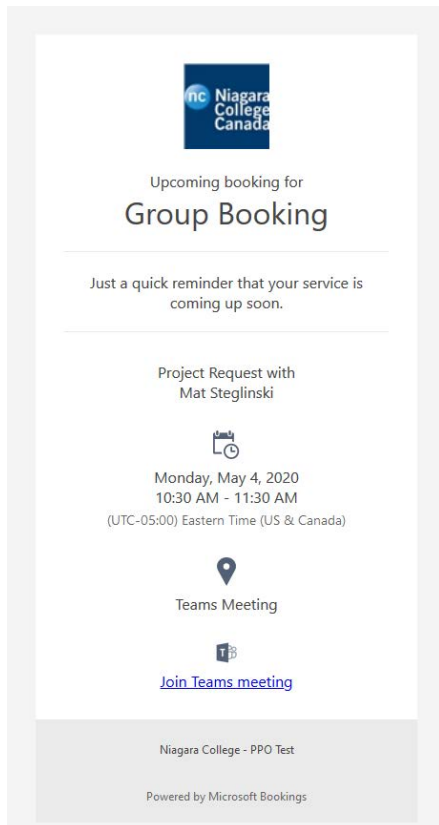
Customers and the staff the appointment is booked with will receive a confirmation email that contains the details of the booking as well as a link to join an MS Teams meeting (If configured).



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 an 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