

# Bookings

Microsoft Bookings is a Web-based and mobile app that integrates to Outlook calendars so that students and colleagues can schedule appointments with faculty and staff. We hope it will provide an intuitive and integrated solution to replace Calendly or other scheduling applications.

Bookings is fairly flexible (i.e., complex) and very new to North Park. Bookings is also constantly being improved by Microsoft. So please reach out to [Information Technology](#) if you want to talk through your needs and best options within Bookings.

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## Access

Bookings is currently accessible via the O365 WebApp

<https://outlook.office.com/bookings/>

Bookings is also accessible within the [Teams](#) application or using the mobile app:

- [Apple iOS](#)
- [Google Play for Android](#)

## NPU Policy

- Business Name: **Schedule - person/team name**
- Resulting URL: <https://outlook.office365.com/owa/calendar/SchedulePersonOrTeam@northpark.edu/bookings/>
- Resulting Email Address: **SchedulePersonOrTeam@northpark.edu** (e.g., ScheduleRitaBook@northpark.edu)

## Background

- The "Business Name" (see Bookings Terminology below) becomes the email address and part of the URL for that Bookings calendar.
- The Business Name can easily be changed. **The email address and URL cannot be changed.** Therefore, the Business Name must be correct before the Bookings site is published the first time.
- In order for you to see all of your Bookings sites (e.g., personal plus departmental), the Bookings email address must be visible to everybody who uses Outlook. That is why it is important to adhere to the Business Name policy; the resulting email address will be visible to everybody. It should be obvious to them which address is for you and which is for your scheduling.

## Bookings Terminology

### Business

A scheduling page in Bookings is based on a "business." We recommend setting up one business for your individual scheduling and a separate business for each group calendar. Within a business there may be several "services" that you can make available (e.g., Advising, Subject Matter Assistance, Career Counseling).

### Services

Each service within a Bookings business can have its own set of appointment parameters, email reminders, and custom questions. For example, an Advising service might have a default duration of 30 minutes, while a Subject Matter Assistance meeting might default to 60 minutes.

# NPU Best Practices

## Business Name

The Business Name determines the URL (Web address) and underlying email address for a Bookings calendar. Once created, the URL and email address of a Bookings business **CANNOT BE CHANGED**. Your Business Name should begin with the word "Schedule" followed by a hyphen and then your name or the name of your team: **Schedule - person/team name**. Calendars with business names that do not meet this standard may need to be replaced, along with their URLs.

## Group Calendar

To allow people to schedule appointments with any member of a group, set up a Bookings business and invite the other members as Staff. Each group member can have a separate set of available hours. Individual calendars and bookings can be taken into account when presenting staff availability to end users. Those making appointments can be allowed to choose a specific staff member. As with an individual's calendar (see Business above) a group calendar can present different services, each with its own set of scheduling parameters.

## Access Beyond North Park

Whenever possible, IT recommends enabling the option to "require a Microsoft 365 or Office 365 account from my organization to book" in any Bookings business. This option will allow only @northpark.edu accounts to schedule appointments from that Bookings page. That setting will prevent abuse by anonymous users.

## A Bookings Example

Professor Rita Book is chair of the Basket Weaving department. She creates a Bookings business named "Schedule - Rita Book" and sets up its business hours to match the time she has set aside for office hours, 1-4pm Monday, Wednesday, Friday. Rita then creates a service within that business named "Basket Weaving Assistance" with a default meeting duration of 60 minutes. The calendar presented to students on the "Schedule - Rita Book" page will only allow the scheduling of "Basket Weaving Assistance" appointments from 1:00 to 4:00 MWF at times when Rita has nothing else scheduled in her Outlook calendar.

During the busy advising period, Rita needs to allow her students to schedule 30 minute advising appointments. She creates another service in her "Schedule - Rita Book" business with a default of 30 minute appointments. When her advising load lessens, she hides that service from her Bookings page. She can re-enable that service at any time.

Later, Rita and her departmental colleagues decide to offer their students opportunities to schedule one-on-one and group meetings for more in-depth explorations of the basket world. Rita creates a new business in Bookings called "Schedule - Basket Case" She schedules available hours to be 6-8pm Wednesdays and adds her departmental colleagues as staff. On the "Schedule - Basket Case" page, students can schedule Wednesday evening sessions with any of the Basket Weaving instructors who are available.

## Options with Bookings

### Business and Services

	Option	Business	Service
<b>Booking page access control</b>			
	Require account to book appt	Y	
	Disable direct search	Y	
<b>Customer data usage consent</b>			
	Personal data collection policy	Y	
<b>Scheduling policy</b>			
	Time increments	Y	Y
	Minimum lead time	Y	Y
	Maximum lead time	Y	Y
<b>Email Notifications</b>			
	Notify business	Y	Y
	Send meeting invite to customer	Y	Y
<b>Staff</b>			
	Allow customers to choose a specific person	Y	Y

<b>Availability</b>		
Customizable weekly hours	Y	Y
Different availability for date ranges	Y	Y
<b>Customize your page</b>		
Colors and logo	Y	
<b>Region and time zone settings</b>		
Language and time zone settings	Y	
<b>Service Settings</b>		
Default location		Y
Default duration		Y
Buffer time		Y
Let managers manage staff-booked appts		Y
Maximum number of attendees per event		Y
Custom fields		Y
Reminders and Confirmations		Y

## Staff

<b>Staff details</b>	
Status	
Initials	
Name	
Phone	
Role	
<b>Availability</b>	
Events on Office calendar affect availability	
Use business hours OR custom hours	
<b>Email Notifications</b>	
Notify when booking is assigned or changed	

## Microsoft Training

<https://www.microsoft.com/en-us/microsoft-365/business/scheduling-and-booking-app>