

## Microsoft Bookings Quick Reference Guide for Faculty and Staff

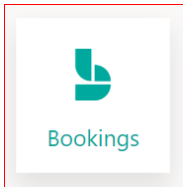
Microsoft Bookings is an online and mobile app designed to allow students and colleagues the ability to schedule appointments with faculty and staff. Using Bookings, you can set office hours or other specific booking times, duration of appointments, acceptable lead and cancellation times, and automatic notifications of booking changes.

Please note: Bookings is only available to faculty and staff who are in the Office 365 environment. This service is not available to Feinberg School of Medicine faculty and staff.

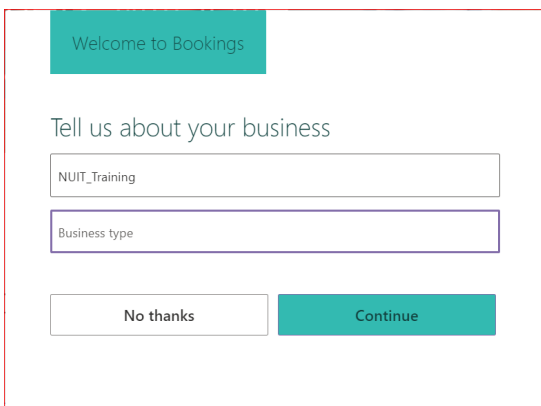
### How to set up Microsoft Bookings

#### Step 1:

1. Visit the Office 365 website at, <https://www.office.com/>, and log in with Your Northwestern NetID credentials.
2. Select the Bookings App from your list of available apps.



3. Click on the “Get it now” button.
4. Select “Add a booking calendar” to create a new Booking calendar.
5. Under the “Business name” field name the Booking calendar. **Important:** Use a unique name and do not use a person’s name since this name will appear in email global address list. It is recommended to use “School/Department CalendarName”. Examples: “SoC Language Placement Testing”, “FSM Study Abroad Advising”, “MSE Major Advising”, “NUIT Training”, etc...

The image is a screenshot of the Microsoft Bookings setup interface. At the top, there is a teal banner that says 'Welcome to Bookings'. Below this, the text 'Tell us about your business' is displayed. There are two input fields: the first is labeled 'Business name' and contains the text 'NUIT\_Training'; the second is labeled 'Business type' and is currently empty. At the bottom of the form, there are two buttons: a white button with the text 'No thanks' and a teal button with the text 'Continue'.

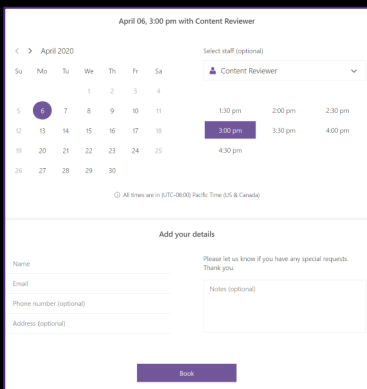
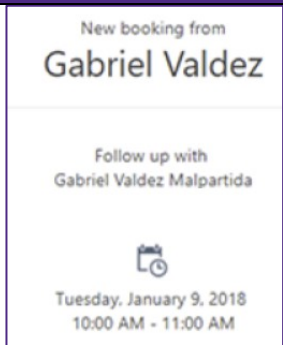
6. Click Continue.

## Step 2:

1. Select “Services” on the navigation bar on the left side of the screen to add one or more services. Examples of service could be “Office Hours”, “Major Advising”, “Placement Testing” etc...
2. Select “Staff” in the left-hand navigation to add/remove faculty, staff, students, or anyone who will be holding the meetings. Note: Staff are required to have a Bookings license and a mailbox in Office 365 to be an administrator or viewer to the Booking. Guests can hold office hours but cannot manage their office hours in Bookings. Other administrators or views will have to manage guests Bookings calendars.
3. Select “Booking Page” in the navigation bar on the left side of the screen.
4. Set up your booking preferences (See Setup Overview in this document).
5. Select “Save and Publish.”
6. Select “Embed” to obtain the hyperlink to direct students to your respective page.
7. Share the hyperlink with students.

## Views

Students will be able to book appointments. Staff and students will receive an email alert, and the appointment will sync with their Outlook calendar. Calendar invites will contain Microsoft Teams online meetings if the “Add online meeting” is selected for the service.

Student	Staff
	 <p>Sample Email Alert</p>

## Setup Overview

The booking page can be tailored to specific needs and preferences.

The screenshot shows the booking page setup interface with the following sections and callout boxes:

- Save & Embed**: Save your settings or click embed to get a shareable link.
- Access Control**: Allow all emails to book an appointment & disable search engine indexing.
- Scheduling Policy**: Set increments for available time slots. Set minimum and maximum lead time for bookings.
- Email Notifications**: Receive an email notification when a booking is created or changed.
- Booking page access control**:
  - ☐ Require an 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.
  - Time increments**: Show available times in increments of: 30 minutes
  - Minimum lead time**: Minimum lead time for bookings and cancellations (in hours): 24
  - Maximum lead time**: Maximum number of days in advance that a booking can be made: 365
- 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**: Custom hours (recurring weekly)
  - Monday**: 8:00 AM - 11:00 AM, 12:00 PM - 1:00 PM
  - Tuesday**: Not bookable
  - Wednesday**: 5:00 PM - 7:00 PM
  - Thursday**: Not bookable
  - Friday**: 2:00 PM - 5:00 PM
  - Saturday**: Not bookable
  - Sunday**: Not bookable
- Customize your page**: Choose your color theme.
  - Preview**: Preview of the booking page.
  - Color theme**: Choose your color theme (12 options).
  - ☐ Set custom color scheme for your booking page
  - Logo**:
    - ☒ Display business logo on your booking page
  - Region and time zone settings**: Choose your booking page language and the time zone. The language you choose will determine the date and time formats for your booking page.
    - Language**: English (United States)
    - Current time zone**: (UTC-08:00) Pacific Time (US & Canada)
    - ☒ Always show time slots in business time zone
- Customize**: Personalize your page with a color theme and business logo.
- Time Zones**: Choose your language and time zone. Click "Always show..." to create consistent time zones.
- Availability**: Customize availability by selecting the days, times, for the desired date range, including specific dates.

## Support

For questions, please contact the IT Support Center via email at [consultant@northwestern.edu](mailto:consultant@northwestern.edu) or call, 847-491-4357 (1-HELP).